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ABSTRACT

This guide was created to help Catholic schools renew their understanding of mission as the soul of education. It presents an assessment protocol where the focus is on the school's mission. The instrument was developed to ensure that concepts, programs, and language would be true to the Catholic identity but would also be understandable to the population at large. The book is divided into four parts. Part 1 examines the process of assessing and planning, with a look at protocol. The second part presents the foundation documents for assessment. Included here are belief statements, the mission statement, the statement of philosophy, the graduate profile, and the parameters for implementing all the above. Part 3 takes a look at the state of the school. This section discusses the school community, the climate and culture of school, its curriculum and instruction, its learning media resources, schedules, student services, student activities and athletics, professional development, governance and accountability, school finance, and school and community relations. The last section, which focuses on strategic planning, highlights the importance of planning as process, action plans, communication, implementation, and validation. An appendix lists the beliefs and directions outlined in the National Congress on Catholic Schools for the 21st Century. (RJM)

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Validating the Vision

An Assessment Protocol for Mission Effectiveness, Institutional Accreditation, and Strategic Planning in the Catholic High School

by Mary Frances Taymans, SND, Ed.D.

National Catholic Educational Association

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An Assessment Protocol for Mission Effectiveness, Institutional Accreditation, and Strategic Planning in the Catholic High School

by Mary Frances Taymans, SND, Ed.D.

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National Catholic Educational Association

Validating the Vision has been approved as an accreditation instrument by the Middle States Association of Colleges and Universities.

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Prologue

They were able to develop a set of postulates about the unique power of the faith communities in which Catholic schools were rooted.

The recent history of Catholic schools in the United States has been remarkably encouraging. Catholic schools stand out as beacons of hope in the context of a national reform effort driven by widespread concern for the quality of American schools. The current wave of American educational reform was launched in 1983 with the publication of *A Nation At Risk: the Imperative for Educational Reform* by the National Commission on Excellence in Education. The commission's charter included "assessing the quality of teaching and learning in our nation's public and private schools, colleges and universities paying particular attention to teenage youth by focusing largely on high schools."[1] The commission found educational excellence elusive, mediocrity rampant and a nation at risk if it did not replace complacency with commitment.

A year earlier, James Coleman and his colleagues had published their first analysis of longitudinal data collected by a U.S. Department of Education study of American high school students.[2] Coleman's report suggested that students in Catholic schools "showed higher performance on standardized tests than students from comparable backgrounds in public schools. For Catholic schools, but not in other private schools, this effectiveness was especially pronounced for students from disadvantaged backgrounds: those with less well-educated parents, blacks and Hispanics."[3] Coleman's work was challenged by some researchers, affirmed by others and criticized by many public school supporters as biased, although Coleman and his colleagues at the University of Chicago had no personal or professional connection to Catholic education. In 1987, Coleman and Hoffer published a second study, *Public and Private High Schools: the Impact of Communities*,[4] that examined new data from the longitudinal project which confirmed and extended the conclusions they had drawn in their earlier work. With the availability of new evidence from subsequent surveys of the original students, they found students in Catholic high schools were more likely to graduate, more likely to enroll in college, more likely to complete their college studies. But most importantly, by exploring significant differences in performance

between students in Catholic and other private schools, they were able to develop a set of postulates about the unique power of the faith communities in which Catholic schools were rooted. Coleman's second study drew little criticism. The research community made subsequent contributions to the literature,[5] and virtually all of the later research reinforced the conclusion that Catholic high schools as a group represented an exceptionally successful educational enterprise. In 1993, a major study by Anthony Bryk and his colleagues concluded that the American Catholic high school's religious vision for education was closer to the democratic ideal of the common good than a public educational system largely driven by the values of radical individualism and the pursuit of economic rewards.[6]

With renewed energy and confidence drawn from the support of bishops as well as scholars and policy makers, Catholic secondary school leaders have seen their enrollments growing, their capital campaigns flourishing and a small but growing number of new high schools opening. Given all the evidence, why do we need to validate the vision? I suggest two reasons: the first is appropriate for all schools, if not all organizations; the second is especially important for Catholic schools, if not all religiously inspired educational institutions.

The challenge of excellence begins with the understanding that excellence is a quest and not a trophy. We are often drawn to the trophies that represent acknowledgement of our success by the civic community. The pride (and marketing value) that our corporate colleagues take in the Baldridge award is readily matched by our pride in Blue Ribbon School designations. Our pride is justified when recognition comes, as it does in the Blue Ribbon program, from a careful peer review process and on-site audits. In the 1997-98 cycle, some 40 Catholic high schools are among the 166 American high schools recognized by the U.S. Department of Education as Blue Ribbon Schools of Excellence. The Catholic educational community has every reason to point with pride to the very large part that our schools play in modeling educational excellence. But each of these fine schools is challenged not simply to maintain but to build on their current success. Good schools, like all good organizations, are committed to continuous improvement. A school's vision is not validated unless it is reviewed and renewed on a regular basis.

Catholic schools must also address a challenge unique to religious institutions in America. Our history is complicated by ambiguity and ambivalence about the place of religion and religious institutions in American life. We have gone through painful times during which explicitly anti-Catholic attitudes subjected our people and our schools to prejudice, ridicule, even violence. The great expansion of Catholic schools in the late nineteenth century was led by American bishops who decided, after prolonged debate, that the hostility of the larger society to Catholic values, inevitably reflected in the way in which public schools were educating Catholic children, meant the Church would have to build its own alternative system of schools. But this debate was not easily resolved, and there were some, a minority, who believed accommodations should be negotiated.

For many years, Catholic schools were considered educationally suspect. With hindsight it is not at all clear that they were in fact educationally inferior, since they succeeded in facilitating the extraordinarily successful socio-economic development of several immigrant communities within a relatively short time. Nevertheless, the

perception of second-class educational status was shared by many educators, including some in the Catholic leadership community who launched their own school improvement programs. Their efforts included many small but significant initiatives, and two giant steps: the sister formation movement, which provided women religious with opportunities to complete full educational and professional preparation programs, and the regional accreditation movement, which encouraged Catholic secondary schools to apply for membership in the appropriate regional associations. Catholic educators were determined to ensure that Catholic schools would become full and respected partners in American education. Their teachers and their schools would meet the highest professional standards. Today the evidence suggests that they succeeded.

The age of blatant anti-Catholicism has passed, but fundamental questions are far from settled. What is the role of the religious school in a secular society? To what extent does the larger society support, resist or ignore the choices some families make to send their children to a religious school? In 1925, the United States Supreme Court stopped the state of Oregon from insisting that all children go to public schools,[7] but in the current debate about publicly financed vouchers, opponents who claim a privileged status for public schools sometimes suggest that religious schools are divisive and un-American. Whether they are unfamiliar with or simply unwilling to acknowledge Bryk's research suggesting that Catholic schools are uniquely true to American democratic ideals, their position forces Catholic school leaders to confront a basic question: How do we participate as partners in the larger American educational enterprise, while bringing our own faith-inspired values to critique and challenge the secular order?

Building on our longstanding enthusiasm for the trinitarian, Catholic school leaders, like the American bishops, have claimed that our educational, civic and religious goals are mutually supportive elements of a single mission. We refuse to let our adversaries, or our unenlightened friends, fracture our religious identity and our academic purpose. Meeting to review and renew their vision for Catholic schools, Catholic educational leaders at the *National Congress on Catholic Schools for the 21st Century* offered a comprehensive description of the authentic Catholic school which includes fundamental beliefs and commitments. Their statements clearly demonstrate their conviction that the religious, civic and academic goals of the Catholic school are integrated in a unified and cohesive mission.[8]

The Catholic Identity of Catholic Schools

We believe that:

The Catholic school is an integral part of the church's mission to proclaim the Gospel, build faith communities, celebrate through worship and serve others.

The commitment to academic excellence, which fosters the intellectual development of faculty and students, is an integral part of the mission of the Catholic school.

The Catholic school is an evangelizing, educational community.

The spiritual formation of the entire school community is an essential dimension of the Catholic school's mission.

The Catholic school is a unique faith-centered community which integrates thinking and believing in ways that encourage intellectual growth, nurture faith and inspire action.

The Catholic school is an experience of the church's belief, tradition and sacramental life.

The Catholic school creates a supportive and challenging climate which affirms the dignity of all persons within the school community.

To put our beliefs into practice, we make these commitments:

We will guarantee opportunities for ongoing spiritual formation for Catholic school faculties, staff and leadership.

We will challenge our faculty, staff, students and families to witness to their belief in Jesus Christ.

We will champion superior standards of academic excellence.

We commit ourselves to teach an integrated curriculum rooted in gospel values and Catholic teachings.

We will welcome and support a diverse cultural and economic population as a hallmark of our Catholic identity.

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Validating the Vision was created to assist schools in renewing their understanding of mission as the soul of the enterprise. Whether this instrument is used for regional accreditation, strategic planning or the assessment of mission effectiveness, all purposes for which it was developed, it is mission that stands out as the soul of the school, the touchstone, the source of institutional vitality, the base measure for growth and improvement. In developing the instrument, we have worked to ensure that concepts, programs and language would be true to our Catholic identity, but also understandable to a larger audience and measurable in a larger context. In the final analysis, we believe with those who preceded us that the American Catholic high school, in serving both the Church and the civic community, is building the kingdom for all God's people.

Michael J. Guerra
Executive Director
Secondary Schools Department
National Catholic Educational Association

Feast of St. Thomas More, 1998

Notes

1. National Commission on Excellence in Education. (1983). *A Nation at Risk: the Imperative for Educational Reform.* Washington, DC. pp. 1-2.
2. J.S. Coleman, T. Hoffer and S.B. Kilgore. (1982). *Public and Private High Schools: High School Achievement.* New York: Basic Books.
3. J.S. Coleman and T. Hoffer. (1987). *Public and Private High Schools: The Impact of Communities.* New York: Basic Books. p.xxiv.
4. ibid.
5. e.g. P.T. Hill, G.E. Foster and T. Gendler. (1990). *High Schools with Character.* Santa Monica, CA: Rand.
6. A.S. Bryk, V.E. Lee and P.B. Holland. (1993). *Catholic Schools and the Common Good.* Cambridge, MA: Harvard University Press.
7. Pierce v. Society of the Sisters of the Holy Names of Jesus and Mary, 268 U.S. 510 (1925).
8. M.J. Guerra, R. Haney and R.J. Kealey. (1991). *National Congress on Catholic Schools for the 21st Century: Executive Summary.* Washington, DC: National Catholic Educational Association.

Acknowledgments

Just as this protocol calls for a high level of involvement by a wide range of constituents invested in the mission and growth of the school, so, too, did the genesis and development of this document. Catholic school educators and others made significant contributions throughout the research, analysis and development. This enabled the best insights and a national perspective to be reflected both in the content and the processes embodied in the protocol.

Michael Guerra, Executive Director of the NCEA Secondary Schools Department, provided the impetus as well as a critical review of the major elements. As a result, the NCEA *Self Study Guide for Catholic High Schools* (1981) has been brought forward in time reflecting new understandings in both school assessment and strategic planning.

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Strategic planning is both an art and a science and the approach taken in this protocol is based on many of the premises developed by William J. Cook, Jr., and The Cambridge Group, Montgomery, AL.

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Both Eileen Emerson and Tracy Toon of the Secondary Schools Department of NCEA invested many hours in rendering the pre-editions and tracking the evolution of the final document. The final edit was performed with expertise by Mary Hinshelwood.

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The Process of Assessing and Planning

A Catholic school is a unique entity with clearly defined boundaries. It is also highly interrelated with the Church, the local community, the nation and even the world. It is both the special uniqueness of the Catholic school and the overlapping relationships that are the basis for this protocol.

The uniqueness lies in the Catholic identity and character of the school. The 1997 Vatican statement, *The Catholic School on the Threshold of the Third Millennium*, positions the school at the heart of the Church stating that the school derives its original characteristics and its "structure" from its identity as Catholic (#11). In their landmark pastoral letter, *To Teach as Jesus Did*, the bishops of the United States (1972) describe the institutional elements characteristic of Catholic identity: message, community and service (#14). Each of these deserves some consideration here as it forms the underpinning of the protocol.

As an element of Catholic identity, message is defined and transmitted through teaching in the broadest sense of the word. In the formal context, teaching in Catholic schools includes both imparting religious concepts and teaching all subjects well. Teaching religious concepts encompasses biblical values, Church teachings and tradition, and moral issues affecting both personal and social actions. Message implies actively engaging students in understanding, probing and responding to each of these areas, telling the story and asking the imaginative question that links reflection and sharing. It addresses what Alfred McBride (1982) describes as the ". . . complexity of human situations that are part of the adventure of becoming a Christian moral person" (p. 10). It is above all, a message whose central reality is Jesus and offers an invitation to decision. This identity, expressed through teaching, is seen in the synthesis between culture and faith. Knowledge is set in the context of faith and becomes wisdom and life vision. There is no separation between time for learning and time for formation, between acquiring notions, discovering truth and growing in wisdom (*The Catholic School on the Threshold of the Third Millennium*, #14).

"Catholic schools draw their life's breath from their roots in the Catholic community and they, in turn, breathe new life into the Church."

(Prologue to the National Congress on Catholic Schools for the 21st Century)

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The research shows that done well, this informational and formational teaching results in people who, according to Andrew Greeley (1989), are change-oriented and flexible, secure in both their world-view and their loyalty to past tradition and values. The criteria set forth in the protocol rests on these assumptions and their expression in the curriculum, climate and culture of the school.

Recent work by Anthony Bryk, Valerie Lee and Peter Holland reported in *Catholic Schools and the Common Good*, points to several major forces that shape the central core of Catholic schools. It is their Catholic character which in turn heightens their effectiveness. These include, in addition to a focused academic structure and an inspirational ideology, a communal school organization (p. 11).

Catholic schools envision achieving academic excellence within the context of a caring community of faith (Heft, 1991). This is a strength drawn from a common moral language, a common history and a shared vision of the human journey (Guerra, Donohue and Benson, 1990). This community aspect of Catholic school identity has been studied descriptively by a diverse set of researchers (Benson, Yeager, Wood, Guerra and Manno, 1986; Coleman and Hoffer, 1987; Convey, 1984; Fee, Greeley, McCready and Sullivan, 1981; Greeley, McCready and McCourt, 1976; Greeley and Rossi, 1966; Guerra, et al., 1990). These studies found a definable correlation between Catholic school attendance, and understanding and valuing community.

Community, as an element of Catholic identity, is a known asset and a challenge. James Coleman (1988) speaks of the powerful influence of community in terms of "social capital." It is an environment where the whole is greater than the sum of the parts and occurs when an adult community collectively contributes to a young person's development. The student experiences a common ground of message, values and expectations that create a safe environment for growth.

This is a concept that is challenging to quantify as part of school measurement but definitely deserves analysis as part of institutional assessment and strategic planning. In addition to direct expression in the **Foundation Documents** and **State of the School,** the value of functional community is integral to the processes presented throughout the protocol from the shaping of the *Mission statement* to the development of the **Strategic Plan**.

Service as a characteristic of Catholic identity is described as a reaching out to those in need after studying the Gospel and Christian social ethic. It is rooted in a focus and conviction that the dignity of the human person, justice, honesty and freedom are worth every effort (Reck, 1991). Service is a characteristic that has been studied and described. In a descriptive analysis of ongoing survey data of U.S. high school seniors, Michael Guerra and others reported that Catholic school students have a vision of a just social world. Catholic school students reported that they were involved in a wide range of service areas and indicated intent to continue such service after graduation (Guerra et al., 1990). Service and service learning have a rich and varied history in Catholic high schools. They shape many an alum's memories and often give reality to the school's specific mission. Conscious attention to their expression in the life of the school is an integral measure of both climate and culture.

A Catholic school's uniqueness is its core of Catholic identity. This identity is rooted in beliefs and values and is expressed through:

- teaching all subjects well in light of Gospel values,
- forming community in the midst of a faith-filled people and
- creating a distinctive climate that includes a commitment to service and global concerns.

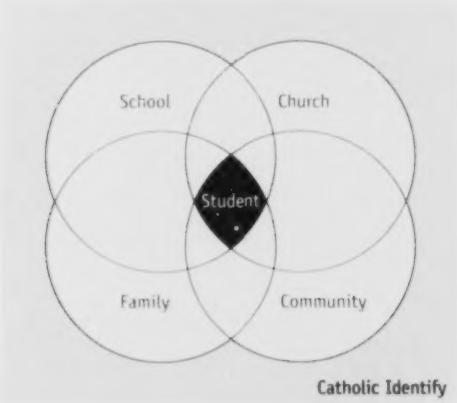
It is a public identity directed toward an adult expression that is intentional about being Catholic and takes ownership for the mission of the Church. To borrow from Yeats, it is not of the mind alone but requires thinking in the marrow of one's bones. Further, it is both experiential and self-critical as well as symbolic, imaginative and rational. It is embodied in the graduate who accepts authority based on competence, whose religious expression is culturally appropriate and who has a preferential option for the poor (Gorman, 1988).

The intent of this protocol is to provide school communities with the tools and the processes for coloring in the lines of the Catholic identity definition as it is embedded in the **Foundation Documents** of the school, to assess the coherence and operational level as expressed in policy, programs, services, ritual and contemporary idiom through the **State of the School** and to plan strategically for a future full of hope and promise.

Further, the school is a dynamic, interrelated structure. Even a casual mental review, or visualization of the history of the school will support this premise. The founding impetus is continually shaped by ever-emerging realities.

A non-exhaustive list of issues coming toward schools and demanding evaluation and response include new measures of accountability, educational reform initiatives, changing family structures, demands for a broader range of service, shifting demographics, financial constraints and legal considerations. There is a new grammar for schools relating to the measurement of a wide spectrum of expectations and outcomes. Frequent questions include: Is this school really Catholic? Who is accepted for admission? Are teachers certified? Is the school accredited? Do students attain acceptance into post-secondary institutions of their choice? What percent of the senior class receive college scholarships? Are there clear standards? What are the indicators of student success in terms of formation as well as information? What measures this school as a moral society?

The Catholic school has the student at the center of its mission and as an institution functions conscious of its relationship to and with family, Church and community.



Catholic Identify

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Visually, this network of relationships colors the definition expressed in the mission and Catholic character of the school. The mission is the blueprint; the color develops from the context of undeniable realities enhancing and sometimes tugging at the lines of the blueprint.

Multiple constituencies sometimes present divergent priorities. Wide variations in social continuity can exist among families living in close proximity. Value-normed communities exist but are not pervasive. This multi-layered, multi-varied social structure of the United States is reflected in the students attending Catholic secondary schools. It is hopeful to note that recent social science research indicates that the Catholic school culture is closely allied with the religious and academic values of parents who send their children to the school.

Knowing who the students are in terms of race, ethnicity, language, learning needs, culture, values and attitudes is necessary to define what pluralism, assimilation and citizenship mean in a particular setting. Schools increasingly are the norm for social networks and relationships between adults and children. This interest and sometimes positive intrusion into the life of the student by the adult school community provides the connection between the life of the school and that of the other communities of which the student is a part. Demonstrating the effectiveness of the school precisely in the area of greatest societal need, that of social capital, can provide a framework for effective planning as it relates back to Catholic identity.

This protocol reflects these realities and relationships and provides the means to assess the school climate as characterized by a strong academic curriculum, high level of expectations for all students and the atmosphere among faculty and students that is conducive to social and spiritual development (Convey, 1991; Guerra et. al., 1990; Coleman and Hoffer, 1987; Greeley, 1989). What is important is that the school as an institution can point to authenticity and coherence in its mission and operation as well as the contextual nature of its relationship with the communities it serves and often leads.

Added to the considerations of uniqueness and relationship is the shift in focus by the regional accrediting agencies in the United States. Attention has moved from lists of strengths, weakness and recommendations as the results of an institutional accreditation process to an inherent linking of assessment and planning. The protocol that follows reflects this change. **Strategic Planning** is embedded in the development and/or review of the **Foundation Documents** and the analysis of the **State of the School**. This is consistent with school renewal being an ongoing process involving the school community broadly defined.

Protocol and Process

Foundation Documents

The **Foundation Documents**, **State of the School** and **Strategic Planning** that comprise this protocol form three inter-connecting frameworks for defining, assessing and shaping the future of the Catholic school as an institution and a community. Though each of the three parts could be utilized independently as part of school-based institutional assessment, accreditation or as a planning process, there is an intended weaving of the three. The *Mission* of the school and the supporting **Foundation Documents** are the touchstones for assessment and the source of vision for planning. Institutional assessment, delineated in the **State of the School**, has merit in its own right but has true value to the extent it measures the operational level of the *Mission* and provides focus for planning. Examining the framework from the pivotal position of **Strategic Planning** reveals not an outcome so much as a basic mindset shaping decisions and ongoing improvement.

State of the School

The pages that follow are not intended to create a one-size-fits-all shirt to be draped over the school. The intent was to develop a protocol that would be a resource for high schools across the country as they consider their unique Catholic mission, undertake regional accreditation and engage in **Strategic Planning**. Each school is encouraged to utilize those elements that are helpful both for school-based use as well as for regional accreditation.

Every effort was made to tap into the dynamic nature of the Catholic school and provide the rationale, tools and processes needed to understand, assess and shape the Catholic identity as embedded and coherently expressed through the climate, culture, academic life, community and services of the school.

Strategic Plan

The intent was also to reflect developments in our understanding of the purpose, function and effectiveness of schools. Curriculum, instruction, assessment, governance, administrative structures, finances, professional development and technology all have different faces than even a few years ago. The protocol offers a means, a process and a discipline for approaching school assessment and planning not as events at fixed points in time but as ongoing processes assuring the effectiveness and extraordinary purpose of the Catholic school.

The processes presented in each part of the protocol rest on several assumptions:

- Commitment to decision-making and direction-setting that is mission-shaped and mission-driven.
- Commitment to systematic school planning in a strategic context.
- Commitment to continuous growth in student achievement.
- Commitment to broad involvement of constituents throughout the process.

The first step is for school leadership to review the protocol and then with a school-based planning team design a plan of action for a most worthwhile journey inside and outside the school that is strategic in process and outcome.

A suggested overview follows that shows the integration of the three frameworks and a possible timeline. This overview is repeated in the section *Planning as a Process*.

An Overview of the Planning Process

	Lead Agents	*Involved*	*Timeline*	*Sample Calendar: June 2001–Fall 2003*
1. Convene planning committee	SH	AD	1 month	June 2001
2. Review protocol and process	SH	PC	1 month	June
3. Identify facilitator and define the role	SH	PC, AD	3 months	June–August
4. Determine timeline	FA	AD, PC	3 months	June–August
5. Develop, revise, affirm **Foundation Documents**	SH, PC	CON	5 months	August–December *will vary*
6. Develop **State of the School** composite	SH, PC	AD, CON, FC	5 months	October 2001–February 2002
7. Identify key questions and issues	FA	AD, PC	2 months	February–March
8. Conduct initial planning session	FA, SH	AD, FC, CON	1 day	
9. Formulate *objectives*	FA	PC		
10. Formulate *strategies*	FA	FC, PC	1 month	March
11. Communicate draft *objectives* and *strategies* for revision and ratification	SH	CON, GOV	1 month	March
12. Form *action plan* committees	PC	FC, CON	1 month	March
13. Develop *action plans*	FA	FC, AD	1 month	March–April
14. Review *action plans*	SH	PC	1 month	April
15. Communicate **Strategic Plan** for ratification	SH	FC, CON	1 month	April
16. Approve **Strategic Plan**	SH	GOV	1 month	May/June
17. Communicate the **Plan**	SH	CON	Ongoing	September 2002
18. Implement *action plans*	SH, PC	FC, AD	Ongoing	September ongoing
19. Validate the **Plan**	PC	CON	Ongoing	Fall 2003

AD = Administration
CON = Constituents
FA = Facilitator
FC = Faculty
GOV = Governing Body
PC = Planning Committee
SH = School Head

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Foundation Documents

The formulation of the Mission statement is the keystone component.

A school is a unique entity that has clearly defined boundaries in many respects, but is highly interrelated with the family, Church, community, nation and even the world. Described by Erich Jantsch as a "never resting structure" (Wheatley, p. 18), schools live in an ever-changing environment and yet each has a core that remains constant. For Catholic schools, there exists within that core the common element of Catholic identity.

This part of the protocol lays the foundation for institutional self-study and **Strategic Planning** by defining the nature and purpose of the school, as expressed in a set of **Foundation Documents** including *Beliefs, Mission, Philosophy* and *Graduate profile*. Of these, the *Mission statement* is the keystone. All institutional assessment and planning processes rest on the assumptions and are driven by the value system expressed in these **Foundation Documents**. The school, as a Catholic educational community at the heart of the Church's ministry, forms the common core running through these three expressions of nature and purpose. A strong sense of the Who, What and How of the school emerges through an inclusive process that brings together members of the school community and others who are invested in the school.

Once validated, the *Mission statement* and other supporting documents form the basis for sorting themes and issues that emerge through the process suggested in the **State of the School** and throughout the planning initiative. The process is designed to be open and inclusive, providing the school with an external scan or sense of how the school is viewed and perceived from without, as well as understood from within.

Specifically, the **Foundation Documents** include:

- ***Belief*** The statement capturing the values, convictions, principles and imperatives that establish the school's priorities.
- ***Mission*** The statement defining the purpose and function of the school; the reason the school exists.

- ***Philosophy*** The statement that extends and expands the *Mission statement* in terms of student development.
- ***Graduate profile*** The public statements identifying what all students will achieve.
- ***Parameters*** The boundaries, or constants, that are non-negotiable at a given point in time.

With intent, the *Parameters* section is presented last. The directions that follow, though, will encourage early consideration of this component.

The school community is encouraged to give this part of the protocol careful consideration, whether engaged in accreditation, school-based self-study and/or strategic planning. Clarity of purpose and ownership are outcomes of the development, refinement and validation of the *Mission* and the supporting statements of *Belief, Philosophy* and *Graduate profile.*

Overview

It is recommended that the planning committee review this part in its entirety both in terms of content and of process before proceeding. The sections as presented do not represent a necessary sequential order. If the entire protocol has not been reviewed, it would be advantageous to do so at this time. Selected sections of the **State of School** data collection can be underway prior to or concurrent with the development of the **Foundation Documents**. Also, the entire protocol is positioned in terms of **Strategic Planning**, so it is important that the planning committee be well acquainted with the intended outcomes.

The *Belief statement* section provides an opportunity to gather the school's constituents or stakeholders, including faculty, students, parents/guardians, alumni(ae), Church and community representatives, to reflect on the school relative to its purpose and in light of present realities. One or more gatherings can provide the occasion for presenting and discussing updates on Church documents relative to Catholic education, societal issues and educational research and trends. This background combined with discussion and the formulation of *Belief statements* from the school community, broadly defined, provides an external scan. This scan gives the school a sense of how it is perceived by its various publics, the expectations that are held for it as an institution and the expected student outcomes. Though it is not essential to generate a list of *Belief statements*, it is very important to accomplish the external scan.

The formulation of the *Mission statement* is the keystone component in this part of the protocol. Many schools already have in place a carefully crafted *Mission statement*. It is recommended that every three to five years this statement be revisited with an eye to any needed refinement in content or language. This is also an opportunity to reaffirm and to promulgate the *Mission*. The process for development or review is a suggestion; the planning committee may determine other options.

The section on the *Philosophy* suggests that this narrative statement can be in process while other elements of the protocol are being addressed. In this section, as well as in the *Mission statement*, the provision for ratification deserves consideration.

The *Graduate profile* translates the Catholic character, vision and values expressed in the *Mission statement* and *Philosophy* into outcomes for each and every student. The *Profile* represents the specific commitment the school is making to the development of the student, as well as setting expectations for students and families as members of this particular Catholic school community.

The *Parameters* section is presented last but deserves attention early in the process. It is positioned last because *Parameters* should not become a preoccupation or stifle creative initiatives. They do matter, however, and if they exist, should be identified and specified at the outset. How they are presented to the school community deserves careful consideration. At most, they are realities that are a matter of pride; at least, they are contingencies that need to be accepted without stifling planning momentum.

Whatever processes are utilized, they should be as open and inclusive as possible so that the resulting documents have a high degree of ownership within and without the school walls. The suggested processes provide for an external scan that measures both perceptions and hopes. A *Mission statement* known only to the planning committee or faculty is not strategic and will not drive the planning process. It is through the development of these documents that the school community engages itself and the larger communities of which it is a part in conversations that shape the future of the school and generate support for achieving this future.

Belief Statements

What

Belief statements express the commonly held convictions about the school as institution and community. These statements establish a prioritization of religious, moral, academic and social values. Through the *Belief statements*, one learns what the fundamental, distinguishing marks of a particular school are.

Why

The development of *Belief statements* is an opportunity to engage the school community, broadly defined, in a significant conversation about the essential elements of the school, as well as hopes and goals for the immediate future. It is also an opportunity to capture the occasionally unexpressed and lofty realities of the school that will be the stimulus for the development or revision of the *Mission statement*. The articulation of the *Belief statements* also sets the stage for the in-depth analysis that constitutes the **State of the School**. Further, the *Belief statements* are an important basis for **Strategic Planning**.

How

It is helpful to provide some background material for those who will be part of the discussion. This could include one or more presentations including a Catholic Church update and background on demographic, educational and societal trends that paint the big picture and position the school in the larger world of church, community and nation. This is an excellent opportunity to bring in people from the

Church, educational and civic communities who can speak effectively to these topics. The Church update component could embrace an overview of the history and tradition of Catholic education in this local community as well as its preeminent position in the mission of the Church as seen in recent documents.

The following quotations and questions are suggestions for shaping the presentations as well as for group discussion.

For Presentation, Reflection and Discussion

Quotations for reflection

In the specifically educational field, the scope of educational functions has broadened, becoming more complex, more specialized. The science of education, which concentrated in the past on the study of the child and teacher-training, have been widened to include the various stages of life, and the different spheres and situations beyond the school. New requirements have given force to the demand for new contents, new capabilities and new educational models besides those followed traditionally. Thus education and schooling become particularly difficult today.

The Catholic School on the Threshold of the Third Millennium, #2

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This overview of the joys and difficulties of the Catholic school, although not pretending to exhaust its entire breadth and depth, does prompt us to reflect on the contribution it can make to the formation of the younger generation on the threshold of the third millennium, recognizing, as John Paul II has written, that "the future of the world and of the Church belongs to the *younger generation*, to those who, born in this century, will reach maturity in the next, the first century of the new millennium" (John Paul II, Apostolic Letter *Tertio Millennio Adveniente*, n. 58). Thus the Catholic school should be able to offer young people the means to acquire the knowledge they need in order to find a place in a society which is strongly characterized by technical and scientific skill. But at the same time, it should be able, above all, to impart a solid Christian formation. And for the Catholic school to be a means of education in the modern world, we are convinced that certain fundamental characteristics need to be strengthened.

The Catholic School on the Threshold of the Third Millennium, #2

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The Catholic school sets out to be a school for the human person and of human persons. "The person of each individual human being, in his or her material and spiritual needs, is at the heart of Christ's teaching: this is why the promotion of the human person is the goal of the Catholic school" (John Paul II, "Address to the International Meeting of the Catholic School in Italy" in *L'Observatore Romano*, 24 November 1991, p. 4).

The Catholic School on the Threshold of the Third Millennium, #8

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The complexity of the modern world makes it all the more necessary to increase awareness of the ecclesial identity of the Catholic school. It is from its Catholic identity that the school derives its original characteristics and its "structure" as a genuine instrument of the Church, a place of real and specific pastoral ministry. The Catholic school participates in the evangelizing mission of the Church and is the privileged environment in which Christian education is carried out. In this way, "Catholic schools are at once places of evangelization, of complete formation, of inculturation, of apprenticeship in a lively dialogue between young people of different religions and social backgrounds" (John Paul II, Apostolic Exhortation *Ecclesia in Africa*, n. 102). The ecclesial nature of the Catholic school, therefore, is written in the very heart of its identity as a teaching institution. It is a true and proper ecclesial entity by reason of its educational activity, "in which faith, culture and life are brought into harmony". (Congregation for Catholic Education, ***Religious Dimension of Education in a Catholic School***, #34). Thus it must be strongly emphasized that this ecclesial dimension is not a mere adjunct, but is a proper and specific attribute, a distinctive characteristic which penetrates and informs every moment of its educational activity, a fundamental part of its very identity and the focus of its mission. (Cfr. Congregation for Catholic Education, *Religious Dimension of Education in a Catholic school*, #33). The fostering of this dimension should be the aim of all those who make up the educating community.

The Catholic School on the Threshold of the Third Millennium, #11

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In this way the Catholic school's public role is clearly perceived. It has not come into being as a private initiative, but as an expression of the reality of the Church, having by its very nature a public character. It fulfills a service of public usefulness and, although clearly and decidedly configured in the perspective of the Catholic faith, is not reserved to Catholics only, but is open to all those who appreciate and share its qualified educational project. This dimension of openness becomes particularly evident in countries in which Christians are not in the majority or developing countries, where Catholic schools have always promoted civil progress and human development without discrimination of any kind. (Cfr. II Vatican Council, Declaration on Christian Education *Gravissimum educationis*, #9). Catholic schools, moreover, like state schools, fulfill a public role, for their presence guarantees cultural and educational pluralism and, above all, the freedom and right of families to see that their children receive the sort of education they wish for them. (Cfr. Holy See, *Charter of Rights of the Family*, Art. 5).

The Catholic School on the Threshold of the Third Millennium, #16

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Members of the Catholic school should have a clear realization of the identity of a Catholic school and the courage to follow all the consequences of its uniqueness.

The Catholic School, #66

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It is precisely in the Gospel of Christ . . . that the Catholic School finds its definition as it comes to terms with the cultural conditions of the times.

The Catholic School, #9.

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Today's Catholic school must respond to challenges by developing in its students a commitment to community and to social skills and virtues needed to achieve it.

To Teach as Jesus Did, #109.

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The Catholic school pursues cultural goals and the natural development of youth to the same degree as any other school. What makes the Catholic school distinctive is its attempt to generate a community climate in the school that is permeated by the Gospel spirit of freedom and love. It tries to guide the adolescents in such a way that personality development goes hand in hand with the development of the "new creature" that each one has become through baptism. It tries to relate all of human culture to the good news of salvation so that the light of faith will illumine everything that the students will gradually come to learn about the world, about life, and about the human person.

Gravissimum Educationis, 8. Declaration on Education, Second Vatican Council

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The Council, therefore, declared that what makes the Catholic school distinctive is its religious dimension, and that this is to be found in a) the educational climate, b) the personal development of each student, c) the relationship established between culture and the Gospel, d) the illumination of all knowledge with the light of faith.

The Religious Dimension of Education in a Catholic School, #1

■ **Catholic Church Update**

- What image best represents the relationship of this school to the parish, area parishes, deanery, region or arch/diocese?
- What elements of recent Church documents addressing Catholic education have particular application to this school?
- How is the Catholic identity of this school, as institution and as community, best expressed?
- What are our bedrock religious convictions?
- What opportunities exist to strengthen the expression of this school's Catholic identity?

■ **Societal Trends**

- As the shape of the American family changes, what are the implications for this school in terms of programs, services, communications?
- What challenges in society are calling for a response from this school community?
- How does our understanding of this school as a Catholic community shape our response to the societal challenges our students face?

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- **Demographic Trends**
  Note: The **State of the School**: *Demographics* section may provide helpful information for this presentation and discussion.
  - What demographic trends should our school community consider at this time?
  - What demographic trends do we need to be aware of looking ahead three, five and 10 years?
  - How can we respond creatively to the challenges these trends present?

- **Educational Trends**
  - What should our educational focus include in view of the students we serve?
  - How does the fact that this is a Catholic school impact the educational outcomes of the school?
  - What standards shape the educational program?
  - What do we believe about students as learners?
  - How do the Beliefs and Directions set forth as the platform for *Catholic Schools for the 21st Century* impact teaching and learning in this school? (See Appendix).
  - What is taught to our students beyond course content?
  - What are the implications for teaching and learning of present and anticipated technology advancements?

The presentations, coupled with discussion, provide an external scan marking both opportunities and challenges coming toward the school community that will need to be taken into account when considering the **Foundation Documents**, **State of the School** and the **Strategic Planning** process.

Process Overview

The development of *Belief statements* is the responsibility of the entire school community. It requires a process that is open, deliberate and inclusive. The major stakeholders of the school should be identified and included. This means, in broad strokes, students, parents, faculty, staff and administrators. School leaders should consider some representation from other significant groups, such as feeder schools, parishes, deaneries, the arch/diocese, sponsoring religious congregation, alumni(ae) and civic community. In establishing the participant list, ask the question of who has and who should have ownership of this enterprise. One large group gathering representative of the overall school community can be convened with small group discussion as part of the format. Another option is a series of small group gatherings. If it is desired to capture what is shared as part of the small group discussion, define a listener-notetaker system to record pertinent comments for later reference.

Following the presentations and the opportunity for group discussion around the above or other open-ended questions, the participants are asked to generate several *Belief statements* about the school. These are bedrock statements about which there is passion.

Invite sharing of these statements. The session facilitator can point out commonality of *Beliefs*.

Establish a committee to compile, hone, draft and edit a concise set of *Belief statements* that are true to what was presented. Provide stakeholders the opportunity to amend and ratify, using school communication vehicles. The final text should be presented and held as a **Foundational Document** of the school, along with the *Mission statement, Philosophy* and *Graduate profile*.

Process Sequence

- Identify the topics that presentations will address, amount of time to be allotted and the presenters. If all four areas—Church, demographics, society and education—are being extensively addressed, more than one gathering may be needed.
- Construct participant guest list: number, constituencies and individuals. Consideration should be given to an invited guest list and an open invitation to the parent community and others who may wish to attend. The specific invitations assure representation. The open invitation is consistent with the purpose of the meeting.
- Extend invitations, positioning the importance of the event and participation.
- Design the meeting format, which could include the following elements:

  a. Prayer.
  b. School head introduces the process upon which the school is embarking, the importance of this group and the place of this event in the total process.
  c. Overviews: Church update, demographics, societal and educational trends (20 minutes each).
  d. Small group discussion based on overviews (30 minutes).
  e. Formulation of *Belief statements* by small groups (30 minutes).
  f. Identification of commonalities (40 minutes).

- Develop *Belief statements* document (planning committee).
- Promulgate through school communication channels.

Sample Belief Statements

Note: the respective mission statements are also presented to show the relationship.

- We believe that we must strive to produce a graduate who is open to growth, intellectually competent, loving, religious, and committed to justice and integrity.
- We believe that diversity plays a significant role in the educational process.

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Mission Statement:

Loyola Blakefield is a Catholic, college preparatory school established by the Jesuits to educate young men in the Ignatian tradition. Our mission is to graduate students who are open to growth, intellectually competent, religious, loving, and committed to justice and integrity.

Loyola Blakefield High School, Towson, Maryland

Value Statements

An alternate expression can be in the form of value statements. These can be formulated through the process described above or may flow out of the *Mission statement.*

Sample Value Statement

We at Archbishop Carroll High School value:

- *Sacredness of Person*—Recognizing that all of humanity is made in the image and likeness of God, we view each person as sacred and a perfect expression of the creator's love.
- *Respect*—Given the sacredness of each person, we regard self and others with great esteem.
- *Integrity*—In all our actions we seek to consistently maintain a moral and spiritual code of conduct that is rooted in Gospel values.
- *Justice*—We are committed to fairness and to the promotion of the Christian vision of right relationship among people.
- *Catholic Education*—We cherish education rooted in the tradition of the Catholic Church and focused on the promotion of spiritual, intellectual, and physical growth of the youth and families we serve.
- *Community*—We are committed to establishing and maintaining the faith-centered collaboration of students, parents, administration, faculty, staff, alumni(ae), Board, Archdiocesan personnel, and friends of Archbishop Carroll High School.

Mission Statement:

Archbishop Carroll High School is a Catholic co-educational college preparatory school operated by the Archdiocese of Washington. Archbishop Carroll High School is dedicated to serving a diverse student population, and as such, provides a Catholic environment that nurtures the whole person by integrating faith and life. Consistent with our Catholic tradition, Archbishop Carroll High School seeks to develop leaders who are rooted in Gospel values and committed to meeting the challenges of building a just society.

Archbishop Carroll High School, Washington, DC

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Mission Statement

The *Belief statements* and the school *Mission statement* constitute the strategic context of the school. The use of the word *strategic* positions these statements as a framework which shapes both institutional thought and action. Strategic language captures both identity and culture while also being dynamic and future-oriented. These two documents, then, are the anchor and reference points shaping both school assessment and planning.

What

The *Mission* is the raison d'être of the institution. The school's relationship to the Church, the student and the communities it serves defines this reason for its existence. The *Mission statement* posits the belief that a Catholic school has the potential to change positively and significantly the lives of the students who attend. In clear and concise language, the shared vision for the school community, along with the commitment to a given course, is set forth. Further, Catholic identity, and the position of academic excellence as a hallmark of this identity, are clearly reflected in the *Mission statement*. A carefully honed statement can be a powerful instrument for conversation, planning, decision-making and evaluation.

The *Mission statement* is not a narrative description. It is a bold declaration of purpose, function and unique position accomplished in 50 words or less. It has been suggested that an appropriate measure of succinctness is whether the *Mission statement* will fit in an 8″ × 10″ frame. It is not a *Philosophy*, which is the expanded narrative description of the school's nature and purpose. However, the *Mission statement* does capture the beliefs and values reflected in the *Philosophy* as these relate to the purpose of the school.

Why

A carefully crafted *Mission statement* is a literary work of art; it should be a presence in the school community. The *Mission statement* defines and measures a school's success. The criteria for whom and what are honored and valued, what activities take precedence, how resources are allocated, what is hoped for graduates as persons of faith, academic accomplishment and skill mastery are all subsumed in the *Mission statement* and evaluated in reference to it. The question, "Is this consistent with the mission?" should be heard often, either directly or rhetorically, as decisions are made at all levels. It is also the standard as the **Strategic Plan** is developed.

It is generally recommended that a school community revisit its *Belief statements* and *Mission statement* every three to five years to check validity both in the present context as well as relative to the desired future of the school. This does not imply that fundamental *Beliefs* or the essence of the *Mission* will have necessarily changed. However the school, as a dynamic person-oriented institution, is continually changing and improving. There may be nuances or actual shifts, either internally or externally, that should be reflected. Examples of major shifts might be a marked difference in demographics, a merger or a transition from single-sex to coed. Examples of nuances might be an expansion of the academic program to include a

more diverse student population, significant enrollment shifts that affect the program or functioning of the school, addition of grades or change in governance structure.

The *Mission statement* should reflect the current culture of the school. Revisiting the *Mission statement* is also an opportunity for renewal for the extended school community. In this regard, the revision or reaffirmation process is valuable in its own right. Capturing the essence of the school in concise and focused language brings conclusion to an engaging process that blends substance, history, tradition and an energetic vision for the future.

When a shift in the *Mission statement* is required, this represents a substantial challenge. This is almost always difficult because it involves relinquishing some good for which there is support, energy and encouragement. It is a change in direction and may be seen as an abandonment of a core element. Change is difficult and changing a good, even if for a better good, is most difficult.

Though developing or revisiting the *Mission statement* is recommended as a first step in the institutional assessment and planning process, there should be an openness to refinement as a result of the **State of the School** study. This is consistent with an ongoing, dynamic process of school improvement

How

Mission statement blueprint

In drafting or revisiting a *Mission statement*, there are some guiding questions to help shape the content and measure a successful outcome. Content questions capture what is at the heart of who we are and why we are. The four seminal questions recommended in formulating a *Mission statement* are:

- Who are we?
- Whom do we serve?
- Why do we exist?
- How do we do what we do?

The following are offered as examples of questions to guide a discussion leading to the construction of a *Mission statement* for a Catholic school. They can also be used to revisit the existing *Mission statement* for validation or revision. Two questions are linked in each category to show the centrality of the student in considering the why, what and how of the school. The subquestions are provided as alternate ways of framing the lead question.

- **Why this school? Who is the student?**
  - Why does this school exist in this location?
  - Why does this school exist at this point in time?
  - What is at the heart of who and why we are?

- **What does this school do? What does a student experience at this school?**
  - What are we trying to achieve?
  - What are our primary goals as a Catholic educational community?

- **How does this school measure success? Who is the graduate?**
  - Why does this school do what it does?
  - What are the outcomes or results we are seeking?
  - What represents competence?

- **What makes the school unique?**
  - What is our hallmark or greatest strength?
  - What dimensions of education are our particular responsibility and focus?
  - What is the particular role this school takes in the Church and in this community?
  - Who has a stake in the continued growth of this school?

The following questions can help measure and refine a successful *Mission statement* once formulated:

- How is the *Mission* of the school positioned relative to strengthening and nurturing the faith?
- Is the statement sufficiently focused to capture the essence of the school?
- Can all members of the school community—students, parents, faculty, staff, administrators—understand, articulate and support the *Mission*?
- Does the statement reflect the established competence of the school?
- Does the statement clearly position the school's commitment to achieving its primary goal?
- Can the statement be used as a reference point for decisions?
- Is the statement focused?
- Is the language clear and concise?

Process Overview

If the school community has been involved in the development of *Belief statements* there are several options for generating or revisiting the *Mission statement*.

- **Option 1**
  A broad representation of the school community could again be convened in one or more gatherings, using a group process and the above questions to surface elements, phrases or even a draft of the *Mission statement*. Following editing by a small group, the draft could be presented for amendment and ratification.

- **Option 2**
  Following the development of the *Belief statements*, the *Mission statement* may best be drafted or revisited by a small, representative group. The larger community then has the opportunity to respond, affirming or offering suggestions for amendment. The writing group needs to be able to sift editorial comments from content recommendations. This process may require several cycles before the final statement receives consensus, ratification and ownership.

  The goal of the planning committee is to blend an open, inclusive and deliberative process with focus and efficiency. This is distinctly different from an open-ended approach which can unnecessarily extend the process.

Sample Mission Statements

Archbishop Carroll High School is a Catholic co-educational college preparatory school operated by the Archdiocese of Washington. Archbishop Carroll High School is dedicated to serving a diverse student population, and as such, provides a Catholic environment that nurtures the whole person by integrating faith and life. Consistent with our Catholic tradition, Archbishop Carroll High School seeks to develop leaders who are rooted in Gospel values and committed to meeting the challenges of building a just society.

Archbishop Carroll High School, Washington, DC

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Mount Carmel Academy is a Catholic, private secondary school offering young women a Catholic education through which they may develop into authentic Christians according to their God-Given gifts. By providing an excellent academic curriculum and extra-curricular program, we help students to form concrete judgements, to weigh social and religious values, to examine their cultural heritage and to develop a spirituality based on an openness to life and to a deeper confidence in God's loving care.

Mount Carmel Academy, New Orleans, Louisiana

«

Santa Fe Catholic High School, a ministry of the Catholic Diocese of Orlando, offers a program of traditional studies encompassing values grounded in the Gospel of Jesus Christ and serves the families of the surrounding communities.

Through academic, spiritual, athletic, extracurricular and service programs, the school endeavors to help each student develop fully as a child of God.

Santa Fe Catholic High School, Lakeland, Florida

«

Providence High School is a Catholic, accredited, college preparatory school for young men and women. Our goal is to develop each student to his/her fullest potential, as a leader, a responsible citizen of the world, who is imbued with a strong set of moral values, a sense of service and a love of learning. Owned and operated by the Sisters of Providence, the school is located in the San Fernando Valley, serving the greater Los Angeles area. We work in collaboration with the parents who are acknowledged as the primary educators of their sons and daughters. We begin our work with the belief that each student is essentially good and infinitely lovable. Guided by our Catholic tradition, we recognize Jesus Christ as the model of the total person we are seeking to develop. In our mission of education, we strive for academic excellence and the total development of the individual.

Providence High School, Burbank, California

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Regis Jesuit High School, a Catholic educational community, affirms the uniqueness and dignity of individuals, inspires that pursuit of excellence, fosters faith and a commitment to service and justice, and strives to develop a connection to the world community.

Regis Jesuit High School, Aurora, Colorado

«

Archbishop Curley High School, a Roman Catholic educational institution of the Archdiocese of Baltimore, is a community of people identified with the Franciscan tradition, forming one family that seeks the proclamation of the Gospel of Jesus Christ, the educational enlightenment of its members, character formation, religious growth of young men through course work and worship, and the promotion of service of the larger community.

Archbishop Curley High School, Baltimore, Maryland

«

Cardinal Mooney High School, the only diocesan secondary school serving Sarasota and Manatee counties, is committed to providing a quality education in a Catholic environment for those who desire it. We are dedicated to the development of the whole person in an atmosphere characterized by a strong sense of family and centered in Gospel values. In all that we do, we strive to instill in our students a sense of discipleship and moral responsibility, thus providing our community with young Christian leaders dedicated to social justice and service.

Cardinal Mooney High School, Sarasota, Florida

Statement of Philosophy

The third foundation document is the *Statement of philosophy*. This is a narrative statement that unwraps the *Mission statement* and gives context to the *Belief statements*. The *Philosophy* expands on the what, why and how of the school found in both the *Mission* and *Belief statements*.

What

The *Statement of philosophy* extends and amplifies the meaning of the Catholic identity of the school providing a transition from the bold, targeted statements of the *Mission statement* to Catholic identity in terms of total student development—spiritual, intellectual, personal, social and physical. The *Statement of philosophy* blends the school community's roots with its vision as a 21st century Catholic educational institution. A reading of the *Statement of philosophy* provides the reader with a set of significant understandings including:

- what all students have the opportunity to learn and experience,
- what type of Catholic educational community exists,
- what dimensions of education receive particular focus,
- how accountability is established, and
- what values are held in trust and embedded in practice.

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Why

Through the process of unpacking the meaning of, and providing a supporting logic for, the *Mission statement*, the *Statement of philosophy* of education constitutes a document of record as it describes how this Catholic school positions itself relative to the student, family, Church and community.

As a narrative document, the *Statement of philosophy* is most dynamic if it is both carefully reasoned and succinctly written. It can be an evolving document as the self-study and **Strategic Planning** proceed. Throughout a self-study and **Strategic Planning** process, there will be numerous check points where the all-important question will be asked, "*Is this coherent and consistent with our mission*?" The answer to this question can be found in the context of the *Philosophy*.

How

Process Overview

If the process for generating the *Mission statement* and *Belief statements* has been open and inclusive, then the *Statement of philosophy* can be drafted by a small group. This is the preferable option; it allows a few to offer the community at large the written portrait of the school. The school community, well represented or as a whole, should be invited to ratify the final document.

The information captured by the listener-notetakers during the discussion of *Belief statements* may contain some very helpful concepts and phrases. The planning committee can provide those writing the document with additional resources worthy of consideration. These may include Church documents or educational principles of the sponsoring religious community.

As mentioned above, the *Statement of philosophy* need not be written or revised prior to engaging in the **State of the School** study and/or **Strategic Planning** aspects of this protocol. The final iteration can be an evolving process.

Sample Statements of Philosophy

NB: the respective mission statements are also presented to show the relationship between the two documents.

▶ **Mission Statement**

Boylan Catholic High School exists to transmit Gospel values which reflect the active presence of God, to provide an environment for the teaching and application of these values, and thereby develop men and women who are informed, responsible and productive citizens of their Church and their country.

Philosophy

Boylan Central Catholic High School is a Christ-centered faith com-munity which exists as a response to the mandate of Jesus: "Go and teach all nations. . . ." Our purpose is to stimulate and guide students in their spiritual, intellectual, moral, emotional, social and physical development through the acquisition and use of knowledge.

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In accord with the truths of the Catholic tradition, we base our teaching mission on the existence of God the Father, Son and Holy Spirit as proclaimed by the Roman Catholic Church.

Boylan also affirms the inherent dignity of every person; the God-given rights and consequent duties of citizens in society; the sacred right of the child of God to a Christian education; and the primacy of the parents in the education of their children.

Boylan Catholic High School, Rockford, Illinois

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▶ **Mission Statement**

Mount Carmel Academy is a Catholic, private secondary school offering young women a Catholic education through which they may develop into authentic Christians according to their God-Given gifts. By providing an excellent academic curriculum and extra-curricular program, we help students to form concrete judgements, to weigh social and religious values, to examine their cultural heritage and to develop a spirituality based on an openness to life and to a deeper confidence in God's loving care.

Philosophy

As Christian educators, we provide an educational environment in which students, grades 9–12, may develop into authentic Christians according to their God-given gifts. To achieve this end, we help students to form concrete judgements, to weigh social and religious values, to examine their cultural heritage, and to develop a spirituality based on openness to life and to a deeper confidence in God's loving care.

Using methods that are flexible, demanding, compassionate, and Christ-like, we help students meet their own needs both for the present and the future. We believe the essence of Christian education is the education of the whole person, intellectually, socially, physically, emotionally, and spiritually.

The challenge of a Catholic school is great. That challenge is redemptive teaching, which means becoming inspirational guides on life's journey and instructors in academic excellence. Teachers must not only instruct students but endeavor to inspire them.

Thus, Carmel symbolizes more than a school. Carmel is a tradition of relating to God in prayer. It also represents an openness to all of life and a form of education based on truth, justice, and love.

The atmosphere we strive to create is a non-threatening one in which two-way communication is encouraged to prevent alienation among students, teachers, staff, and administration, and more positively to encourage development of the faith community.

All members of the faith community should manifest a reverence for God and the things of the Catholic Church as enunciated through the directives of our local bishop, and maintain and teach by word and example the moral principles established by the Ten Commandments.

Mount Carmel Academy, New Orleans, Louisiana

«

▶ **Mission Statement**

Santa Fe Catholic High School, a ministry of the Catholic Diocese of Orlando, offers a program of traditional studies encompassing values grounded in the Gospel of Jesus Christ and serves the families of the surrounding communities.

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Through academic, spiritual, athletic, extracurricular and service programs, the school endeavors to help each student develop fully as a child of God.

Philosophy

Santa Fe Catholic High School community believes that God is the creator of life and source of human rights and duties. In partnership with the Diocese of Orlando, Santa Fe offers a Catholic educational program vitalized by the truth that people achieve happiness by loving service to God and to others.

Santa Fe Catholic accepts the responsibility of cooperating with other educational influences, especially the family, in the formation of the whole person—spiritually, academically, emotionally, socially, and physically—in an atmosphere of mutual trust and respect.

Santa Fe Catholic commits itself to teach the Gospel message through word and example and to model Christianity in action for its students. Santa Fe unites its liturgy and prayer as a school community and responds to the needs of the wider community through action for social justice in a global society.

Santa Fe Catholic is committed to helping its students grow in the image and likeness of Christ for each other. In accordance with the belief that each individual is unique and blessed with different talents, a Santa Fe education provides the opportunity for students to discover, develop, and utilize those talents.

Santa Fe Catholic believes that learning is a life-long process and strives to motivate the students to take ownership for their own learning and seek out solutions to life's problems in the light of Christ's teachings.

Santa Fe Catholic High School, Lakeland, Florida

❮❮❮

▶ **Mission Statement**

Providence High School is a Catholic, accredited, college preparatory school for young men and women. Our goal is to develop each student to his/her fullest potential, as a leader, a responsible citizen of the world, who is imbued with a strong set of moral values, a sense of service and a love of learning. Owned and operated by the Sisters of Providence, the school is located in the San Fernando Valley, serving the greater Los Angeles area. We work in collaboration with the parents who are acknowledged as the primary educators of their sons and daughters. We begin our work with the belief that each student is essentially good and infinitely lovable. Guided by our Catholic tradition, we recognize Jesus Christ as the model of the total person we are seeking to develop. In our mission of education, we strive for academic excellence and the total development of the individual.

Philosophy

Providence High School is a Catholic, private, co-educational, college-preparatory institution which endeavors to serve students of varied academic capabilities and from different religious, social and economic backgrounds. The school carries on the educational mission of the Church within the Archdiocese of Los Angeles. It continues the educational heritage and vision of the Sisters of Providence who sponsor the school.

We participate in the total mission of the Church by proclaiming the Gospel of Jesus, by creating an environment of Christian community and by encouraging services to others.

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We provide an education based on Christian principles as expressed in the Catholic tradition: we recognize the claim to education that is the right of each individual; we recognize each student as a unique individual with abilities, insights and needs which are in process; and we recognize Christ as the model of the total person we are seeking to develop. Guided by these principles, we seek to lead the student toward a more free, responsible and God-centered life. This program provides an atmosphere in which the student prepares not only for further formal education, but also for lifelong learning.

Our present college-preparatory program reflects our belief in encouraging our students to make personal choices which demonstrate awareness and responsibility to promote human dignity.

Our task as educators is not accomplished by ourselves. We share this mission and its various responsibilities with parents, who are the primary educators, the communities in which they live, and the local Church.

Providence High School, Burbank, California

Graduate Profile

What

The *Profile of the graduate* describes the student at the point of exit from the school. It states the values, achievements and readiness that each student will manifest upon graduation. The *Graduate profile* could be considered a combination of a Bill of Rights and set of corresponding responsibilities for student, faculty, staff and administration. In other words, if the *Mission* is operative and appropriately translated into programs and services, the *Profile* defines the outcomes each and every student will attain.

The *Profile* also recognizes that the student at graduation is in transition from an adolescent world to an adult one and that many aspects of development are still in process. A set of markers for a person at a threshold rather than at a pinnacle is an apt description (*Profile of the Graduate of a Jesuit High School at Graduation*, p. 101).

Why

Translating the Catholic identity, vision and values expressed in the *Belief statements* and *Mission* into statements that describe student outcomes requires an important translation and transformation of concepts from the ideal and global to specific expression in the development of an adolescent at this school. The *Profile* gives expression to what the *Mission* means in the operational life of the school.

Another value of the *Profile* is that each student should be able to grow into the outline or shape it defines. This positions outcomes in terms of all students regardless of specific courses taken or post-graduation plans. Once drawn, the *Profile* provides a concrete reference point for faculty and staff when designing curriculum, instructional experiences, service programs, auxiliary resources, student and family services.

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How

Looking at the *Belief statements* and *Mission*, and *Philosophy* if written, the *Graduate profile* is developed by answering the questions:

After _____ years at this school, what should the graduating student know?

- value?
- be able to do?
- believe?

It is a challenging exercise as the graduating student is in the process of developing acuity and skill in framing questions, analyzing and choosing across all aspects of spiritual intellectual, emotional and physical development.

The process is similar to that described for developing a *Philosophy statement*. Some schools elect to develop the *Graduate profile* in lieu of writing a narrative *Philosophy statement*, believing that the *Profile* provides comparable information as would be expressed in a *Philosophy statement* but is totally student-focused.

Drawing on the insights generated through the discussions concerning the *Belief statements* and the *Mission statement*, along with these documents, a small group could draft the *Graduate profile* for consideration by the faculty as a whole.

Each declaration in the *Profile* completes an opening statement similar to, "At graduation, the (name of school) student will/is..." A well crafted profile is characterized by integrated, multi-dimensional, value-laden statements connecting the mission to the real life of the student (Ozar, p. 3).

The document should be reasonable in length and though challenging, realistic in expectations so that attainment can be measured.

Sample Graduate Profiles

These samples are drawn from the work of the Jesuit Secondary Education Association Commission on Research and Development and the application of this work by two specific Jesuit schools. The third example includes the same concepts in the form of a vision statement.

▶ Excerpts from *Profile of a Prep Graduate at Graduation*, Georgetown Preparatory School, Rockville, MD

It is hoped that, upon graduation from this school, the Georgetown Prep graduate will be:

i. Open to Growth
   - He is beginning to take responsibility for his future.

ii. Intellectually competent
   - He is growing in his curiosity to explore ideas and issues.

iii. Religious
   - He is learning how to communicate with God through prayer, both private and liturgical.

iv. Loving
   - He has begun to recognize and eradicate the prejudices which he finds within himself.

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v. Committed to doing justice
   - He has begun to recognize that the values of a materialistic society often conflict with the Gospel.

«««

▶ Excerpts from *Graduation Outcomes*, Loyola Academy, Wilmette, IL

In the Jesuit tradition, Loyola Academy engages students in the Ignatian pedagogical process of experience, reflection, action and evaluation. Through this process, students not only develop those academic, personal and social skills prerequisite to a successful college experience, but also commit to life-long learning as a foundation for effective service to others and the development of a just world. To this end, a Loyola Academy graduate will be able to:

- integrate the practice of personal and communal prayer, reflection and service into an individual faith and conscience informed by Catholic theology and tradition.
- read, write, listen and speak effectively for a variety of purposes and audiences.
- think critically, creatively, and with a global perspective, using the vocabulary and concepts of the arts, literature, languages, religious studies, natural and social sciences and mathematics.

«««

▶ Excerpts from *Vision Statement*, Bishop Kearney High School, Rochester, NY

Bishop Kearney High School will continue to be a positive force in the Greater Rochester areas by preparing students to take leadership roles in the community. It will provide an atmosphere of Catholic values where students develop leadership, initiative, cooperation and social awareness. The Kearney experience will enable our students to become part of a distinctive, community-oriented and nurturing environment which fosters personal growth. Our students will excel in an environment of demanding academic standards and will develop the skills needed for success in further education and in the workplace: strong problem-solving and communication skills, technological competence, flexibility and an appreciation of diversity. The graduates of Bishop Kearney will possess a commitment to life-long learning and will become the spiritual and visionary leaders needed to transform our communities and our society for the better.

Parameters

What

Parameters define what a school in relation to its *Mission* will or will not do or become. The overriding example of a *Parameter* is that the school is *Catholic*. This positions Catholic as a noun rather than an adjective. This is a constant and gives definition to all other variables, such as a commitment to quality religious education or being overtly pro-life.

By definition, a *Parameter* is a constant in a given setting that may be a variable in other contexts. It is a limit or boundary the school places on itself. In the best sense, *Parameters* set in place protective mechanisms that help focus the *Mission statement*.

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In other words, what serves as a *Parameter* for one school may not be one for another. For example, it may be integral to school A's *Mission* that it is a school for young women. This would not be a *Parameter* at coed school B.

Parameters are distinguishing characteristics or features that establish the limits on other variables; they are also cautions. For school A, being single-sex shapes a host of other variables from facilities to program.

Parameters come in positive and negative varieties. In either case, a *Parameter* should be judged as sustainable and definite. Some examples include a no-tolerance stance on violence, a decision to remain in an urban location or a subsidy limit from a religious community, diocese or parish.

These constants are generally determined by the governing body or bodies of the school. It would be imperative on the leadership of the school to be sure that early in the process the necessary communications have taken place to surface and, if necessary, negotiate real or potential *Parameters*.

Why

It is worth the effort to unearth, if necessary, and to articulate the *Parameters*. They will not be many in number but, if they are truly *Parameters*, they have far-flung implications, are not negotiable and can impact planning outcomes. It is unfortunate to come to the end of a planning process and learn that an *objective* or *action plan* is untenable because of an unidentified *Parameter* that some assumed all understood.

3

State of the School

This part of *Validating the Vision* provides an aid for a systematic investigation of the **State of the School**. It constitutes a model for conducting an internal scan collecting information from and about the people, programs and services that comprise the school. It is not intended to be static; rather, by asking for data and comparisons in a specified window of time it attempts to generate a dynamic picture of an ever-adjusting and adapting institution, however subtle the changes may be.

The **State of the School** also provides the database for measuring the merit of a particular program, service or structure against accepted standards. There are a number of sources for standards, including:

- national and state criteria
- regional accrediting bodies
- literature, including Church documents and research outcomes
- the school, including the mission statement
- the diocese and/or religious congregation norms

Presently, regional accrediting associations are placing emphasis on student achievement compared to measurable objectives as a core element both of self-study and planning.

Judgments on effectiveness and adequacy require data positioned against criteria. Gathering information allows judgments and planning to be both informed and defensible. Fact-free, like fat-free, has its limitations. A fact-free evaluation is a collection of opinions and perceptions that may offer little direction for planning. This does not mean that information gathering should be limited to quantifiable data. The qualitative narrative is of utmost importance as it provides institutional reflection, stakeholder involvement and context for evaluation and decision-making. All data exists within a context. The context is best assessed through discussion involving the right mix of constituents.

Catholic schools are people places and highly contextual. Students are entrusted to a school with a specific mission. A particular climate and culture are deliberately shaped; but, they also evolve. Informed judgments and effective planning must consciously balance intrinsic worth with measurement against external standards.

The following pages include a data-gathering buffet. However, like all good buffets, it comes with the warning that, "Taken en masse, the following can be harmful to your health." By intent, the information charts, reflection questions, summary snapshot and assessment criteria cover all major areas of the school. By design, each school will select only that which serves present needs, whether this be part of accreditation and/or planning. If this protocol is being used for institutional evaluation, this section deserves extended consideration. If the emphasis is on planning, then information should be gathered to the extent that it provides the necessary platform for informed decision making.

To whatever degree the school engages in the **State of the School**, the process should be positioned throughout in a strategic planning context. Information is collected to provide an objective basis for expressing the *Mission*, shaping the vision and developing the goals and strategies.

Overview

What is presented in this part of the protocol is intended to be both comprehensive and substantive. Collection of information across a broad scope is combined with reflection and analysis to achieve an internal scan. It is incumbent upon the steering committee to blend the elements to achieve the optimal result for this school at this time. One objective of this section is to exit with a clear understanding of the operational level of the school *Mission*. Another is to target those aspects of the school that merit attention in the **Strategic Plan**. The plan will hinge on three to five school-wide objectives that will shape priorities and the use of time and resources as the school community realizes its desired vision for the school, enhances its mission effectiveness and the expression of its Catholic identity and focuses the process of ongoing improvement. Prior to commencing the **State of the School**, it is recommended that the planning committee review the entire section and select those components that will be studied (School Community, Climate and Culture, etc.) and the elements (Data Collection, Summary Snapshot, etc.) that will be completed for each component. The selected Data Collection components can be undertaken simultaneously with the development or review of the **Foundation Documents**.

Each component of the school addressed in the **State of the School** includes the following elements: *data collection, summary snapshot, assessment criteria* and *focus for planning*. Several sections also include a set of *reflection questions*. The purpose of each of these components is as follows:

Data Collection: These sections provide a quantitative and qualitative measure of the school at the present time. The information provides an objective basis for assessment and planning. The data can provide the information backdrop for rating the assessment criteria. Data need only be collected and presented to the extent that it is necessary as part of an accreditation and/or planning process.

Summary Snapshot: This element can be used to capture information from the data that warrants special consideration relative to the school's *Mission* and **Strategic Plan**. This may be a particular strength as well as an issue that has come into focus. It may also be a factor the school considers important relative to accreditation. It follows the Data Collection and is meant to be a quick and immediate response to a first look at the data.

Assessment Criteria: The intent of the Assessment Criteria is to reach a consensus judgment about the match between the respective statement and the achievement of the *Mission* of the school. This is the central piece in the **State of the School** as it engages the appropriate stakeholders in placing a marker both on the value of the particular statement and how practice matches mission. The results focus planning. It is recommended that the Assessment Criteria element be completed for any component being studied.

Reflection Questions: Several sections, either because of importance relative to the *Mission* of the school or the nature of the component under consideration, lend themselves to reflective discussion. The questions posed in these sections ask appropriate members of the school community to look at this program, this school community, these students in light of the Catholic character of the school. It is meant to deepen and enrich the study of the area and should receive consideration.

Focus for Planning: This element draws together the portrait developed through the assessment criteria, summary snapshot and/or reflection questions. It provides an intentional narrowing and drawing down of the particular elements that will be included in the **Strategic Plan**. These elements will find expression in the school-wide *objectives* that focus the **Plan**.

The School Community

Demographics

Student Enrollment Data

- Enrollment by years. *(Use official fall figures.)*

Grade	*Enrollment by Years*											
	5 Years Ago _____-_____			*3 Years Ago* _____-_____			*1 Year Ago* _____-_____			*Current Year* _____-_____		
	M	*F*	*Total*	*M*	*F*	*Total*	*M*	*F*	*Total*	*M*	*F*	*Total*
TOTAL												

- Freshmen applications and enrollment.

Year	*# of Registered Freshmen*	*# of Applicants*	*Desired Enrollment*
Current Year _____-_____			
One Year Ago _____-_____			
Two Years Ago _____-_____			
Three Years Ago _____-_____			
Four Years Ago _____-_____			

- Of the admitted freshmen or transfer students, the number of students with documented special learning needs.

Year	*# of Registered Freshmen or Transfers*	*# Identified with Documented Special Learning Needs*	*Percent of Admitted Students with Documented Learning Needs*
Current Year _____-_____			
One Year Ago _____-_____			
Two Years Ago _____-_____			
Three Years Ago _____-_____			
Four Years Ago _____-_____			

- List the school's yearly registration retention rate as a percentage. Indicate whether this represents the most recent year or is a five-year average.

	Last year to current year	*5-year average*
Grade 9 to 10	_____%	_____%
Grade 10 to 11	_____%	_____%
Grade 11 to 12	_____%	_____%

- Number of graduating seniors:

		Number of Seniors in Class	*Percent of Senior Class Graduating*
Current Year	(_____ - _____)	_____	_____
One Year Ago	(_____ - _____)	_____	_____
Two Years Ago	(_____ - _____)	_____	_____
Three Years Ago	(_____ - _____)	_____	_____
Four Years Ago	(_____ - _____)	_____	_____

- Reasons for transfer or withdrawal across all grades. For students who do not graduate, indicate the percentage who leave for the following reasons. Use a five-year average or a given year; whichever will best describe the pattern for this school.

	Percent of All Students Who Transfer or Withdraw
Academic reasons	_____%
Discipline	_____%
Family mobility	_____%
Financial difficulty	_____%
Unknown	_____%
Other: _____	_____%
_____	_____%

- Describe the post-secondary intentions of the most recent graduating class.

_____% attend 4-year colleges or universities
- _____% Catholic
- _____% Private
- _____% Public or State

_____% attend community colleges

_____% attend technical or other post-secondary institutions

_____% enter the military

_____% enter the work place

_____% other: _____

_____% not known

Community Profile

- Give your best estimate of family income and indicate the percentage of families in each category. Use these category definitions and provide appropriate income levels as a guide.

_____% Welfare (*Defined as* $___,_____ - $___,_____)

_____% Working poor (*Defined as* $___,_____ - $___,_____)

_____% Lower middle income (*Defined as* $___,_____ - $___,_____)

_____% Upper middle income (*Defined as* $___,_____ - $___,_____)

_____% Affluent (*Defined as* $___,_____ - $___,_____)

- Based on enrollment figures for all grade levels, indicate the percentage of students affiliated with a church.

_____% Roman Catholic

_____% Other Christian religions

_____% Other religious traditions

_____% No affiliation

- What percentage of students are in each of the following categories?
  Report this data as you would for other reports. Categories may vary.

  _____% African American
  _____% Asian/Pacific Islander
  _____% Caucasian
  _____% Other: _____
  _____% Hispanic/Latino
  _____% American Indian
  _____% Multi-racial

- Indicate percentage of families who claim a language other than English as their first language.

  _____%

- Indicate the percentage of students living with a single parent, guardian or in another non-traditional family setting.

  _____%

- Indicate the number of elementary schools from which students come.

  _____

- Indicate percentage of the entry level class that came from a public school.

  _____%

- How do the racial, ethnic and economic demographics of the student body compare with that of the community where the school is located? Of the parishes served? Make your comparison relative to religion, culture and economics.

  _____
  _____
  _____
  _____

- Explain any anticipated significant demographic shifts in your local community in the next three to five years that could or would alter the student population.

  _____
  _____
  _____
  _____

- Explain any projected plans or trends among other local schools that might impact your enrollment within the next three to five years.

  _____
  _____
  _____
  _____

SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

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ASSESSMENT CRITERIA

The School Community, Demographics

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
1. Student enrollment is consistent with the mission of the school.	☐	☐	☐	☐	☐
2. The school is serving Catholic families relative to the potential for Catholic student enrollment.	☐	☐	☐	☐	☐
3. Students enrolled two or more years are academically successful.	☐	☐	☐	☐	☐
4. The school meets the range of academic needs of the students seeking admission.	☐	☐	☐	☐	☐
5. The school meets the range of academic needs of the students who are accepted into the student body.	☐	☐	☐	☐	☐
6. The school meets a range of academic needs consistent with its mission.	☐	☐	☐	☐	☐
7. The socio-economic profile of the student body is consistent with the local community the school serves.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

FOCUS FOR PLANNING

The School Community, Demographics

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This form is important for **Strategic Planning**.

Strengths

The demographic and community information gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- Enrollment trends raise the following questions/issues relative to mission and planning.

- Retention trends raise the following questions/issues relative to mission and planning.

- The community profile raises the following questions/issues relative to mission and planning.

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Administration, Faculty and Staff

Administrative Profile

- Identify the positions and titles used in your school's administrative structure, for example, president, principal, assistant principal for academics, dean of students.

Position	*Full-time*	*Part-time*	*Primary Responsibilities*

- Indicate the length of time this administrative structure has been in place in the school.

  _____

- Describe any significant administrative changes in the past three years and any projected changes for the coming three years.

  _____

  _____

  _____

  _____

- Describe how the administration provides coordination and direction for curriculum development and instruction.

  _____

  _____

  _____

  _____

- Describe how the administration provides coordination and direction for student activities.

  _____

  _____

  _____

  _____

- Describe how the administration provides coordination and direction for student services.

- Describe how the administration cultivates and enhances a school climate representative of the school's mission.

- Identify the school administrator who is charged with mission effectiveness.

- Define the processes and mechanisms members of the administration use to ensure that the school's beliefs, mission and philosophy are operative in decisions, programs, services and communication.

- Describe the process for the selection of the chief administrator.

Faculty Profile

- Calculate the student-teacher ratio. Include full-time and full-time equivalents; include only classroom teachers.

  _____

- Indicate the percentage of faculty members who are affiliated with a church.

  _____% Roman Catholic

  _____% Other Christian religions

  _____% Other religious traditions

  _____% No affiliation

- Indicate the number of persons in each of the following categories

	Full-time	*Part-time*
Teaching faculty	_____	_____
Chaplain	_____	_____
Campus minister	_____	_____
Guidance	_____	_____
Media	_____	_____
Technology	_____	_____

- What percentage of the teachers are in each of the following categories:

_____% African American

_____% Asian/Pacific Islander

_____% Caucasian

_____% Hispanic/Latino

_____% American Indian

_____% Multi-racial

_____% Other: _____

- Indicate the stability of the teaching staff.

	Years in this School						*Total Years in this Profession*
	0-1	*2-5*	*6-10*	*11-15*	*16-20*	*20+*	
MEN Clergy							
Lay							
Religious							
WOMEN Lay							
Religious							
TOTAL							

■ Indicate the academic preparation of the teaching staff.

	PhD/EdD Degree	*MS/MA Degree*	*BS/BA Degree*	*Assoc. Degree*	*Non-Degreed*
MEN Clergy					
Lay					
Religious					
WOMEN Lay					
Religious					
TOTAL					

■ Indicate the certification or equivalency of the teaching staff. (*Note:* Equivalency is defined as meeting state requirements but not in possession of a certificate.)

Staff	*State Certification/ Equivalency*	*No Certification*	*Other (Specify below)*
Clergy			
Lay			
Religious			
TOTAL			

■ Indicate the profile for faculty teaching religion or theology.

	Advanced Degree			*BA Degree*			*Non-Degree Credits*			*Hold Degree other than Religious Education/Theology*	*# of Religion/ Theology Classes*
	TH	*RE*	*RS*	*TH*	*RE*	*RS*	*TH*	*RE*	*RS*		
Clergy											
Sister											
Brother											
Lay											

CODES

RE = Religious Education **TH** = Theology
RS = Religious Studies

■ Describe the process used in faculty selection. Attach sample interview questions.

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- Discuss how understanding and commitment to the mission of the school is measured in the selection process.

- List the most common reasons for faculty turnover.

- Describe how in the hiring process the Catholic identity of the school is shared with the candidate.

- List the expectations for faculty regarding the school's Catholic identity. Identify who determines these expectations and assesses whether or not they are met.

Staff Profile

- Indicate the areas for which the school offers services.

Service	*# of Staff*	*Full or Part-time*		*Salaried or Volunteer*	
		# Full-time	*# Part-time*	*# Salaried*	*# Volunteer*
Admissions					
Cafeteria					
Clerical					
Custodial					
Health					
Instructional (aides)					
Plant maintenance					
Technology support					
Other					

- Describe the process used in selecting support staff.

- How is understanding and commitment to the mission of the school measured in the selection process?

- Describe how in the hiring process the Catholic identity of the school is shared with the candidate.

- List the expectations for staff regarding the school's Catholic identity. Identify who determines these expectations and assesses whether or not they are met.

Activities and Athletics Staffing Profile

- Complete the following chart for personnel involved with athletics and activities programs.

Position	*#*	*Faculty or Adjunct*		*Salaried/Stipend or Volunteer*	
		# Faculty	*# Adjunct*	*# Salaried/Stipend*	*# Volunteer*
Activity Advisors					
Athletic Director					
Coaches					

- Describe the process for selecting the coaching staff.

- Describe the process for selecting the moderator/advisor for clubs and activities.

- How is understanding and commitment to the mission of the school measured in these selection processes?

- Describe how in the hiring process the Catholic identity of the school is shared with the candidate.

- List the expectations for extra-curricular staff and coaches regarding the school's Catholic identity. Identify who determines these expectations and assesses whether or not they are met.

SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

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ASSESSMENT CRITERIA

The School Community: Administration, Faculty and Staff

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
1. The administration provides coordination and direction for curriculum development and instructional processes.	☐	☐	☐	☐	☐
2. The administration provides coordination and direction for the activities and athletic programs.	☐	☐	☐	☐	☐
3. The administration provides coordination and direction for pastoral care and guidance services.	☐	☐	☐	☐	☐
4. The mission of the school is apparent in the direction set by the administration.	☐	☐	☐	☐	☐
5. The Catholic identity of the school is a priority of the administration.	☐	☐	☐	☐	☐
6. Administrative decisions reflect Gospel values.	☐	☐	☐	☐	☐
7. Commitment to spiritual leadership is a priority of administrators, faculty, advisors and coaches.	☐	☐	☐	☐	☐
8. The commitment and actions of the principal and other school leaders move the school toward realizing its mission and goals.	☐	☐	☐	☐	☐
9. Leadership is shared and significant decisions are made collaboratively.	☐	☐	☐	☐	☐
10. The hiring process for administrators assesses the candidate's understanding of and commitment to the Catholic identity and mission of the school.	☐	☐	☐	☐	☐
11. The tenure of the administration is a strength.	☐	☐	☐	☐	☐

	5	4	3	2	1
12. The racial and cultural profile of the faculty is respectful of the community served.	☐	☐	☐	☐	☐
13. The tenure of the faculty is a strength.	☐	☐	☐	☐	☐
14. The academic background of the faculty is a strength.	☐	☐	☐	☐	☐
15. The academic background of the religion/theology department faculty is a strength.	☐	☐	☐	☐	☐
16. The hiring process for faculty assesses the candidate's understanding of and commitment to Catholic identity and the school's mission.	☐	☐	☐	☐	☐
17. The hiring process for support staff assesses the candidate's understanding of and commitment to Catholic identity and the school's mission.	☐	☐	☐	☐	☐
18. The hiring process for coaches and activity directors assesses the candidate's understanding of and commitment to Catholic identity and the school's mission.	☐	☐	☐	☐	☐
19. The spiritual development of administrators, faculty and staff is a priority.	☐	☐	☐	☐	☐
20. Administrators, faculty and staff are familiar with Church documents on Catholic education.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ _____ Date: _____

Committee: _____

FOCUS FOR PLANNING

The School Community: Administration, Faculty and Staff

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This form is important for **Strategic Planning**.

Strengths

The information gathered in this section identifies the following strengths relative to administration, faculty and staff.

Questions and Issues: Respond to those areas pertinent for planning.

- Administration, faculty and staff profiles raise the following questions and/or issues relative to mission and planning:

- The priorities and exercise of leadership raise the following questions and/or issues relative to mission and planning:

- Hiring practices raise the following questions and/or issues relative to mission and planning:

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Climate and Culture

Environment

- List five descriptors that characterize the school environment. Provide an example of each.

- Explain how the use of space and religious symbols are expressions of the school as Catholic.

- Identify the Gospel values reflected in the **Foundation Documents** that characterize the school environment.

- Cite several examples that express the school's commitment to cultural awareness and respect for diversity.

- Characterize the academic environment of the school relative to expectations and the role of student as learner.

- Describe how students are involved in the school's decision making processes.

- Describe how personal decision-making on the part of students is cultivated.

- State the intent of the discipline system and its connection to the mission of the school.

Spiritual Life

- The identity of a community is expressed through its rituals, traditions and programs. Describe those that help to define the Catholic identity of this school.

- Describe the student retreat program. Include the objectives for the program and the connection with the mission.

- Indicate how often your school provides students with opportunities for each of the following religious activities:

	Weekly	*Monthly*	*Quarterly*	*Per Semester*	*Annually*
Eucharistic liturgy: required					
Eucharistic liturgy: optional					
Sacrament of Reconciliation					
Para-liturgical service					
Pastoral counseling					

- Identify other religious opportunities that are a regular part of school life.

- Identify the aspects of school life that have the most significance for the religious development of the students.

- Identify opportunities for adult faith development for faculty, administrators and parents.

Programs

- Identify any ways that school programs are influenced by the presence of students of other faiths.

- If there is a campus ministry program, identify the major elements.

- Profile the role of community service in the school; include requirements, opportunities and faculty involvement.

Ceremony and Traditions

- Identify the ceremonies and traditions that distinguish the school. Specify those that are particular expressions of this school's history and its identity as a Catholic school.

- Indicate the criteria for awards given by the school. Show the connection to the mission.

Admissions

- Identify the primary tenet shaping the admissions program.

- Describe policies governing admissions.

- Describe admissions practices that acquaint the student and family with the mission, beliefs and philosophy of the school.

- Describe the practices that convey the Catholic identity of the school to new and perspective students and their families.

- Describe how new students and families are incorporated into the school community.

- Describe how the academic environment of the school is introduced to new students and families.

REFLECTION QUESTIONS

These questions address Catholic identity in various school contexts. An inherent Catholic identity finds expression in school climate, culture and overall coherence that connects people, structures, programs and processes. Using the information collected as the basis for discussion, reflect on the following questions. Broad school community involvement in the discussion is recommended and encouraged. Responses to these questions will influence the formulation of schoolwide goals as part of the strategic planning process.

- What characterizes the school as an evangelizing educational community?

- How does the school community celebrate liturgically?

- How is community service positioned relative to the mission of the school?

- How does the mission influence school awards and recognition?

- How is the ongoing spiritual development of students part of the context of programs and services?

- How would you describe the Catholic identity of the school in relation to climate, culture and integration of programs and services?

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SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

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ASSESSMENT CRITERIA

Climate and Culture

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
Environment					
1. The school environment portrays an identifiable integration of faith with life and culture.	☐	☐	☐	☐	☐
2. The Catholic identity of the school is immediately clear through use of symbols and space.	☐	☐	☐	☐	☐
3. Images reflecting the Catholic identity and heritage of the school are prominently displayed throughout the school facility.	☐	☐	☐	☐	☐
4. Symbols reflecting the charism of the religious order associated with the school are evident.	☐	☐	☐	☐	☐
5. Administrators, faculty, staff, students, parents and board members are periodically engaged in discussions affecting school environment.	☐	☐	☐	☐	☐
6. Faculty, staff and administrators work together, formally and informally, to solve problems and make decisions.	☐	☐	☐	☐	☐
7. Adults in the school community provide individual caring support for students.	☐	☐	☐	☐	☐
8. The universality of Catholicism is reflected in the school's cultural awareness programs.	☐	☐	☐	☐	☐
9. Respect for diversity is articulated and practiced at the school.	☐	☐	☐	☐	☐
10. Students are involved in decisions which affect their school lives.	☐	☐	☐	☐	☐
11. Personal decision-making skills are described, taught, discussed and evaluated.	☐	☐	☐	☐	☐
12. Learning takes place in a safe and orderly environment with minimal disruption.	☐	☐	☐	☐	☐

	5	4	3	2	1
13. Expectations of students are regularly articulated in a variety of settings with parents, students and faculty.	☐	☐	☐	☐	☐
14. Programs of study, activities, athletics, codes of conduct and discipline reflect the Gospel values expressed in the Foundation Documents.	☐	☐	☐	☐	☐
15. The mission statement is prominently displayed in the school and in publications.	☐	☐	☐	☐	☐
16. The mission statement is used as a guide and resource for prayer, reflection and planning.	☐	☐	☐	☐	☐

Spiritual Life

1. Appropriate attention is given to rituals and traditions that demonstrate and reinforce the school's Catholic identity.	☐	☐	☐	☐	☐
2. The faculty has opportunities to advance its understanding of Catholicism and what makes a school Catholic.	☐	☐	☐	☐	☐
3. Attention is given to building a Christian community among faculty and staff.	☐	☐	☐	☐	☐
4. In-service programs annually consider the development of all faculty and staff as spiritual leaders in the Catholic faith tradition.	☐	☐	☐	☐	☐
5. A faculty retreat is held annually.	☐	☐	☐	☐	☐
6. The retreat program for students is well defined and consistent with the mission of the school.	☐	☐	☐	☐	☐
7. Regular opportunities for prayer, reconciliation and liturgy are integral parts of school life.	☐	☐	☐	☐	☐
8. Pastoral care for students and faculty is provided at an appropriate level.	☐	☐	☐	☐	☐
9. The spiritual life of the community is a priority in planning.	☐	☐	☐	☐	☐

Programs

1. The school community and school programs respect the presence of students of other faiths.	☐	☐	☐	☐	☐
2. Faculty and administration share a collective sense of responsibility for student outcomes.	☐	☐	☐	☐	☐
3. The campus ministry program has clearly defined objectives reflecting the mission of the school.	☐	☐	☐	☐	☐
4. Adequate institutional support is given to campus ministry.	☐	☐	☐	☐	☐

	5	4	3	2	1
5. Community service programs have clearly defined objectives and requirements.	☐	☐	☐	☐	☐
6. Adequate institutional support is given to community service.	☐	☐	☐	☐	☐
7. Time is provided for students to reflect on and share about community service experiences with fellow students.	☐	☐	☐	☐	☐
8. Community service programs relate to the mission of the school and are seen as integral to the educational program of the students.	☐	☐	☐	☐	☐
Ceremony and Traditions					
1. Appropriate ceremonies and rituals that articulate and celebrate the heritage and value system of the school are regularly held.	☐	☐	☐	☐	☐
2. Ceremonies and rituals are evaluated according to the mission of the school and the needs of the students.	☐	☐	☐	☐	☐
3. Students play a prominent part in planning, organizing and conducting the school's ceremonies and rituals.	☐	☐	☐	☐	☐
4. Honors and awards reflect the mission of the school and its heritage	☐	☐	☐	☐	☐
Admissions					
1. The admissions policy is consistent with the mission of the school and its Catholic identity.	☐	☐	☐	☐	☐
2. The admissions policy is stated clearly and followed.	☐	☐	☐	☐	☐
3. The admissions process acquaints students and their families with the mission, beliefs and philosophy of the school.	☐	☐	☐	☐	☐
4. The academic environment of the school, its expectations of and its services to students and families is systematically described using various forums and methods of presentation.	☐	☐	☐	☐	☐
5. Programs and practices are in place to incorporate first-year students and their families into the life of the school.	☐	☐	☐	☐	☐
6. Programs and practices are in place to assist transfer students and their families in making a successful transition.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

FOCUS FOR PLANNING

Climate and Culture

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This form is important for **Strategic Planning**.

Strengths

The school climate and culture information gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- The Catholic identity of the school, as expressed in and through its climate and culture raises the following questions and/or issues relative to mission and planning.

- The school environment raises the following questions and/or issues relative to mission and planning.

- Provision for the spiritual life of the school raises the following questions and/or issues relative to mission and planning.

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- The framework and provision for campus ministry and service programs raises the following questions and/or issues relative to mission and planning.

- Admissions policy and procedures raise the following questions and/or issues relative to mission and planning.

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Curriculum and Instruction

The heart of this section consists in the reflection questions on page 69. What precedes them are possible data collection vehicles to focus analysis of curriculum and instruction.

Academic Program

- Provide a student body academic profile. Indicate any changes in this profile over the past five years. Indicate any anticipated significant shifts in the next five years

- Explain how the religious nature of the school affects the curriculum across disciplines.

- Explain how the curriculum meets the specific academic needs of the student body.

- Identify instructional practices that have been institutionalized to accommodate varying learning modalities.

- Describe initiatives taken to incorporate interdisciplinary and cross-disciplinary course integration.

- Define global education in the context of this school.

- Describe any unique aspects of your academic program.

- Identify any ways the program is influenced by the presence of students of other faiths.

- Describe how curriculum is developed and by whom. Identify standards used for curriculum decision making.

- Have available for an accreditation site visit the following documents:
  - school curriculum indicating what all students are entitled to learn
  - department curricula
  - course curricula

- Identify assessment processes and tools used in evaluating academic program effectiveness, including the following measures, to the extent to which each applies in this school setting:

  _____ The NCEA Assessment of Catholic Religious Education (ACRE)

  _____ Standardized testing

  _____ PSAT, SAT, ACT

  _____ The grad at graduation

  _____ College acceptance

  _____ Success in college

  _____ Community evaluation of service program

  _____ Religious congregation evaluation

  _____ Alumni(ae) communications

  _____ Other: _____

- Describe forms of student assessment regularly incorporated into the instructional process.

_____

_____

_____

_____

—OR—

- Describe the repertoire of methods generally utilized by teachers to assess student learning. Considering the entire school, indicate the extent to which each of the following are employed.

4: broadly used throughout the school
3: some use
2: seldom used
1: no evidence of use

_____ Paper and pencil

_____ Portfolio

_____ Presentation

_____ Problem solving

_____ Self/peer assessment

_____ Student-teacher conference

_____ Group project

- Identify 3 areas where technology is effectively used in support of instruction.

_____

_____

_____

_____

- Identify percent of the student body having access and utilizing technology in school as part of the instructional process:

	Access	*Utilize*
Word processing	____%	____%
Email	____%	____%
Internet	____%	____%
Research	____%	____%
Multimedia presentations	____%	____%
Laboratory experiments	____%	____%
Other: _____	____%	____%

- To what extent is your school *exploring* curriculum and pedagogy shaped by the following (*mark the appropriate range*):

	Actively Pursuing				*Not at All*
Technology in support of instruction	☐	☐	☐	☐	☐
Alternate forms of student assessment	☐	☐	☐	☐	☐
Curriculum integration across subject areas	☐	☐	☐	☐	☐
Other: _____	☐	☐	☐	☐	☐

- To what extent is your school *implementing* curriculum and pedagogy shaped by the following (*mark the appropriate range*):

	Actively Pursuing				*Not at All*
Technology in support of instruction	☐	☐	☐	☐	☐
Alternate forms of student assessment	☐	☐	☐	☐	☐
Curriculum integration across subject areas	☐	☐	☐	☐	☐
Other: _____	☐	☐	☐	☐	☐

- Indicate where the following academic decisions are made:
"●" indicates input; "X" indicates decision

		Department		
	Teacher	*Group*	*Chair*	*Administration*
Course offerings				
Course syllabus				
Teaching methodologies				
Text selection (or equivalent)				

- Describe articulation programs in place with local elementary schools. What is the focus of these programs? How often do articulation meetings occur?

_____

_____

_____

_____

- Indicate the percentage of the operational budget that directly supports instruction. Exclude salaries, benefits, hardware, Internet access. Consider classroom instructional materials, media center and library materials, software, field trips and other educational resources directly used for instruction.

  _____%

- Identify the percentage of the school budget that supports technology including hardware, Internet access and staffing.

  _____%

Learning-Media Resources

- Describe how learning-media services support the total educational program and provide encouragement to students and staff to broaden and extend their range of learning.

- Describe where learning-media resources are located in relation to other instructional space.

- Describe access and availability of media resource materials for faculty.

- Describe access and availability of media resources for students.

■ Indicate the degree to which the media center personnel are involved in the development and evaluation of curriculum and other school programs.

	Involved in Planning and Evaluation of Curriculum			*Involved in Planning and Evaluation of Other School Programs*		
	Substantial	*Moderate*	*Minimal*	*Substantial*	*Moderate*	*Minimal*
Curriculum development						
Curriculum resources						
Faculty professional development						
Technology						
Other: _____						

■ Indicate the percentage of the operating budget that supports media resources. Exclude salaries.

_____%

Schedule

■ The school schedule could be best described as:

_____ block _____ traditional

_____ modified block _____ other: _____

_____ modular

NOTE: *A copy of school schedule should be available.*

■ Indicate the number of days in each of the following categories in a school year.

The school year is considered to be _____ days.

_____ Instructional days _____ Faculty/staff retreat days

_____ Teacher professional days _____ Full day–special event days

_____ Student retreat days per grade

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REFLECTION QUESTIONS

The following questions address how Catholic identity is expressed in and through the academic life of the school as described in the *Belief Statements of the National Congress on Catholic Schools for the 21st Century*. Responses to these questions will help shape the formulation of schoolwide objectives as part of the strategic planning process.

> *"Catholic schools are unique faith centered communities which integrate thinking and believing in ways that encourage intellectual growth, nurture faith and inspire action."*
>
> National Congress on Catholic Schools for the 21st Century Executive Summary

- How is academic excellence linked to mission? To Catholic identity?

- What ongoing efforts are in place to assure that the curriculum is integrated, rooted in Gospel values and deliberate in faith development?

- How does the school demonstrate its commitment to the intellectual development of all students?

- How is individual student academic progress measured?

- What is this school's commitment to inclusivity?

- How does this school create an advantage for the disadvantaged student?

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SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

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ASSESSMENT CRITERIA

Curriculum and Instruction

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
Religious Education					
1. Religious education is a priority in scheduling, budgeting and planning.	☐	☐	☐	☐	☐
2. The religious education curriculum meets archdiocesan/diocesan standards/norms.	☐	☐	☐	☐	☐
3. The religious education of the students is a concern of all faculty members.	☐	☐	☐	☐	☐
4. The religious dimension of all areas of curriculum is acknowledged.	☐	☐	☐	☐	☐
5. Church documents, pastoral letters and the Catechism of the Church are readily available and used by administrators, faculty, and students.	☐	☐	☐	☐	☐
6. The religious education program has defined formative components.	☐	☐	☐	☐	☐
7. The religious education program reflects an understanding of the principles of evangelization.	☐	☐	☐	☐	☐
8. The religious education program is developmentally appropriate and catechetical in nature.	☐	☐	☐	☐	☐
9. The religious curriculum covers Church teachings.	☐	☐	☐	☐	☐
10. The curriculum includes Catholic social teaching and its application, locally and globally.	☐	☐	☐	☐	☐
11. Education about human sexuality is consistent with Church teachings and arch/diocesan norms, and includes parental involvement in planning.	☐	☐	☐	☐	☐

Curriculum

	5	4	3	2	1
1. The religious nature of the school is appropriately reflected throughout the curriculum.	☐	☐	☐	☐	☐
2. The curriculum gives expression to and is consistent with the school's mission.	☐	☐	☐	☐	☐
3. The curriculum reflects informed decision making based on educational research and is constructed by the faculty.	☐	☐	☐	☐	☐
4. The curriculum identifies desired learner outcomes.	☐	☐	☐	☐	☐
5. The curriculum provides the appropriate platform and transition for post-secondary education.	☐	☐	☐	☐	☐
6. The curriculum prepares those students who will make the transition from school to work.	☐	☐	☐	☐	☐
7. The curriculum meets or exceeds state standards.	☐	☐	☐	☐	☐
8. The curriculum meets or exceeds national standards.	☐	☐	☐	☐	☐
9. There is a clear articulation of courses across grades and disciplines.	☐	☐	☐	☐	☐
10. The overall curriculum is designed to assure high levels of achievement for all students in regard to religious knowledge, academic achievement, personal growth and post-secondary preparation.	☐	☐	☐	☐	☐
11. The curriculum planning process takes into account professional association standards for various disciplines.	☐	☐	☐	☐	☐
12. The curriculum is a deliberate match between the academic profile of the student body and the desired outcomes for students at graduation.	☐	☐	☐	☐	☐
13. The curriculum includes life skills and character formation.	☐	☐	☐	☐	☐
14. The curriculum strengthens cultural sensitivity and respect for others.	☐	☐	☐	☐	☐
15. Curriculum development is an ongoing process involving all faculty	☐	☐	☐	☐	☐
16. Curriculum and instruction integrate resources beyond the school.	☐	☐	☐	☐	☐
17. Teachers engage in interdisciplinary curriculum planning.	☐	☐	☐	☐	☐

	5	4	3	2	1
Instruction					
1. A variety of instructional practices accommodate varying learning modalities.	☐	☐	☐	☐	☐
2. Interdisciplinary instruction is evident across student learning experiences.	☐	☐	☐	☐	☐
3. There is clear evidence that teaching practices and learning experiences result in high student achievement for all students.	☐	☐	☐	☐	☐
4. Technology applications have been effectively incorporated into the instructional programs.	☐	☐	☐	☐	☐
5. Instruction leads students to an understanding of global realities.	☐	☐	☐	☐	☐
6. Teaching practices and learning experiences include developing critical thinking strategies for all students.	☐	☐	☐	☐	☐
7. Students are actively engaged in the learning process in student-centered settings that include investigative experiences and independent learning.	☐	☐	☐	☐	☐
8. Students have opportunities to work in collaborative learning groups.	☐	☐	☐	☐	☐
9. Students have access to and utilize the Internet and other forms of technology for information access, research, writing, problem solving, etc.	☐	☐	☐	☐	☐
Assessment					
1. A range of assessment methods are incorporated in the instructional process, including needs assessment.	☐	☐	☐	☐	☐
2. There is a direct correlation between assessment, instruction and objectives.	☐	☐	☐	☐	☐
3. Assessment strategies are aligned with school objectives for all students and the curriculum.	☐	☐	☐	☐	☐
4. Assessment data is monitored and used to improve instruction.	☐	☐	☐	☐	☐
5. Students and parents are aware of the criteria for evaluation and receive the results.	☐	☐	☐	☐	☐
6. Assessment measures student ability to apply knowledge.	☐	☐	☐	☐	☐
7. Assessment measures student ability to communicate effectively.	☐	☐	☐	☐	☐
8. Assessment measures student ability to construct meaning.	☐	☐	☐	☐	☐

	5	4	3	2	1
9. Assessment measures student ability to solve problems.	☐	☐	☐	☐	☐
10. Assessment accommodates varying learning modalities.	☐	☐	☐	☐	☐
11. External assessments are used in planning the school's curriculum and instruction.	☐	☐	☐	☐	☐
12. The school schedule supports the academic priorities of the school.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

FOCUS FOR PLANNING

Curriculum and Instruction

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This form is for **Strategic Planning**.

The planning process will generate one or two *objectives* relating to this section of the **State of the School** study. As part of the planning process, target and succinctly state any direction for the school emerging from this analysis.

Strengths

The information about curriculum and instruction gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- The curriculum of the school raises the following questions and/or issues relative to mission and planning.

- Instruction in the school raises the following questions and/or issues relative to mission and planning.

- The school's assessment practices raise the following questions and/or issues relative to mission and planning.

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Student Services

Guidance/Counseling Resources and Services

- Indicate the frequency of opportunities for personal guidance/counseling.

	As Requested	*Monthly*	*Quarterly*	*Semester*	*Annually*
Group					
Individual					

- If group guidance takes place, list the topics addressed.

	Topics
Grade 9	
Grade 10	
Grade 11	
Grade 12	

- Indicate areas of personal guidance/counseling most frequently addressed.

_____ Alcohol abuse

_____ Bereavement

_____ Depression

_____ Drug abuse

_____ Family issues

_____ Sexual harassment

_____ Other: _____

- Indicate areas of personal concern for which the department provides referral options.

  _____ Alcohol abuse
  _____ Bereavement
  _____ Depression
  _____ Drug abuse
  _____ Family issues
  _____ Sexual harassment
  _____ Other: _____

- There is a defined crisis intervention plan in place.

  ☐ Yes ☐ No

- Identify how students are guided relative to post-secondary planning.

  _____ Career day(s)
  _____ Career information center
  _____ College information center
  _____ Formal school-to-work program
  _____ Individual advising
  _____ Referrals
  _____ Other: _____

- Indicate other resources available to students through the guidance/counseling department.

  _____ Interest inventories
  _____ Referrals (indicate types not already identified)
  _____ Summer work opportunities
  _____ Other: _____

- Identify the role of the guidance/counseling department in the college application process.

  _____ Financial aid information
  _____ Letters of reference
  _____ On-campus visits by college representatives
  _____ Parent information session
  _____ Process academic records
  _____ Review of college application package
  _____ Scholarship information
  _____ Student information sessions
  _____ Other: _____

- Describe how the guidance/counseling department communicates with individual teachers, other school departments and the administration.

- Describe the advisor/advisee program, if one is in place.

- Indicate guidance/counseling staff involvement in the development and evaluation of school programs.

- Describe follow-up studies conducted to assess graduate post-secondary placement and outcomes.

- Describe how guidance/counseling services fulfill the school's mission and objectives.

Other Student Services

- Describe the health services available to students through the school.

  _____ Designated clinic space

  _____ First aid

  _____ Nurse on duty full-time

  _____ Nurse on duty part-time

  _____ Nutrition

  _____ Screenings: sight, hearing, dental, TB, other.

  _____ Other: _____

- Describe other student services that are linked to the mission and objectives of the school.

  _____

  _____

  _____

  _____

SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

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ASSESSMENT CRITERIA

Student Services

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
Guidance/Counseling Resources and Services					
1. The school provides for regular academic counseling for all students.	☐	☐	☐	☐	☐
2. The school has a program to help students in post-secondary planning.	☐	☐	☐	☐	☐
3. The school provides education and support for students and families in the college application process.	☐	☐	☐	☐	☐
4. The school is responsive to meeting the personal needs of the students.	☐	☐	☐	☐	☐
5. Counseling and campus ministry personnel cooperate on programs addressing needs such as suicide prevention, bereavement and other areas of personal support.	☐	☐	☐	☐	☐
6. The school is a resource center for referring students and families in need of special support.	☐	☐	☐	☐	☐
7. The guidance department regularly communicates with individual teachers, departments and administration.	☐	☐	☐	☐	☐
8. The school administration involves the guidance department in the evaluation of student programs and services.	☐	☐	☐	☐	☐
9. Follow-up studies are in place to evaluate graduate post-secondary placement outcomes.	☐	☐	☐	☐	☐
10. The guidance/counseling services are an integral part of the school's mission.	☐	☐	☐	☐	☐
Other Student Services					
1. Health services are available to students.	☐	☐	☐	☐	☐
2. The school is responsive to emerging student needs and provides programs, integrating counseling and campus ministry when appropriate.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____ _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

Student Services

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This **Focus for Planning** will be important for **Strategic Planning**.

Strengths

The student services information gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- The scope of the guidance/counseling services raises the following questions and/or issues relative to mission and planning.

- The scope of other school appropriate student services raises the following questions and/or issues relative to mission and planning.

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Student Activities and Athletics

Activities

- Identify the clubs and other co-curricular activities available to students.

	Check if activity is available	*Does activity have a service component?*
Cultural		
Dance		
Drama		
Environmental		
Foreign language		
Forensics		
Games (e.g. chess)		
Honor societies		
Music		
Photography		
Publications		
Service		
Student Government		
Support groups (e.g. AL-ANON) _____ _____		
Other: _____		

- Describe how a club or activity is chartered. Include how these charters connect to the school's **Foundation Documents**.

- Describe formalized efforts to develop student leadership through involvement in activities.

Athletics

- Identify the sports available to students.

Sport			*Open to Grade Levels*				*Percent of students trying out who make the team*
	Male	*Female*	*Grade 9*	*Grade 10*	*Grade 11*	*Grade 12*	
Baseball							
Basketball							
Cheerleading							
Field hockey							
Football							
Golf							
Ice hockey							
Lacrosse							
Soccer							
Softball							
Swimming							
Tennis							
Track and field							
Volleyball							
Wrestling							
Other:_____							

- Describe the extent to which instructional time is adjusted to accommodate clubs and sports.

_____

_____

_____

_____

- Indicate the percentage of activity advisors/moderators who are faculty or staff members.

_____%

- Indicate the percentage of the athletic coaches who are faculty or staff members.

_____%

- Indicate the percentage of the operating budget that supports student activities. Do not include salaries or stipends.

_____%

- Indicate the percentage of the operating budget that supports athletics. Do not include salaries or stipends.

  _____%

- Indicate other income sources for activities and athletics in addition to tuition and fees charged to students.

  _____

  _____

  _____

  _____

- Provide the rationale for cases where academic credit is given for participation in clubs or athletics.

  _____

  _____

  _____

  _____

REFLECTION QUESTIONS

As in all other aspects of the school, Catholic identity is expressed through activities and athletics. The following questions provide an opportunity to engage members of the school community in exploring existing and potential ways of fostering total student development through these avenues. Responses to these questions can be important for strategic planning.

- How does the student-advisor/moderator and athlete-coach relationship shape attitudes and values both, in theory and practice?

- How does the activities program give expression to the mission of the school?

- How is the coaching staff supported in the effort to imbue students with the mission and philosophy of the school?

- Is there a community service aspect to activities and athletic programs?

- Are eligibility, training and team rules consistent with the school's mission and philosophy?

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SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

BEST COPY AVAILABLE

ASSESSMENT CRITERIA

Student Activities and Athletics

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
Student Activities and Athletics					
1. Student activities and athletics are opportunities for Christian character formation.	☐	☐	☐	☐	☐
2. A range of clubs and co-curricular activities, consistent with the school's mission, are responsive to student interest and need.	☐	☐	☐	☐	☐
3. The school has a formal way of chartering clubs.	☐	☐	☐	☐	☐
4. The school provides a formalized program for the development of student leadership as discipleship.	☐	☐	☐	☐	☐
5. The school periodically evaluates its clubs and activities in relationship to carrying out the mission of the school.	☐	☐	☐	☐	☐
6. Faculty and/or staff members see service as class or club advisors and coaching as integral to the school's mission.	☐	☐	☐	☐	☐
7. The school provides for ongoing education and formation of faculty and non-faculty advisors/moderators and coaches.	☐	☐	☐	☐	☐
8. School financial support for student activities is adequate and in proportion with the total school program budget.	☐	☐	☐	☐	☐
9. External sources of income to support activities and athletics programs are approved and monitored by the school.	☐	☐	☐	☐	☐
10. An ongoing effort is made by the school to evaluate the percentage of the budget dedicated to the activities and athletic programs.	☐	☐	☐	☐	☐
11. The school maintains policies consistent with its mission for students participating in activities and athletics.	☐	☐	☐	☐	☐
12. Participation in activities and athletics is high and is representative of the overall student body.	☐	☐	☐	☐	☐
13. Students have a voice in planning activity and athletic offerings.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

FOCUS FOR PLANNING

Student Activities and Athletics

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This **Focus for Planning** is important for **Strategic Planning**.

Strengths

The student activities and athletics information gathered in this section identify the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- The student activities program raises the following questions and/or issues relative to mission and planning.

- The student athletics program raises the following questions and/or issues relative to mission and planning.

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Professional Development

- Describe the formal and informal opportunities for spiritual development available for adminstrators, faculty and staff.

- Identify the professional organizations in which faculty members and administrators hold membership; include leadership roles held in any of these organizations.

- Describe professional development opportunities offered and planned for the faculty during the past, present and upcoming school years.

  Past year

  Present year

  Projected

- Summarize the technology in-service opportunities for faculty.

- Indicate the percent of faculty who have *school* access and utilize the following technology applications:

	Access	*Utilize*
Word processing	___%	___%
Record keeping	___%	___%
Electronic mail	___%	___%
Internet resources	___%	___%
Multimedia presentations	___%	___%

- Check those elements that are regular components of professional development.

  _____ on-site offerings

  _____ off-site offerings

  _____ mentoring

  _____ teacher research

  _____ staff-led seminars

  _____ participation in networks

  _____ professional conferences

  _____ courses

  _____ observation at other schools

- Describe the role of department chairpersons in professional development.

- Indicate whether faculty develop their own professional growth plans. If so, are these plans extensions of the school mission? Are the plans incorporated into the supervision plan?

- Indicate the percent of annual operating budget dedicated to professional development.

- Identify other funding sources for professional development.

- If there is funding for your faculty's advanced degree work, indicate the guidelines for financial support.

- Describe ways in which effective teaching is recognized.

- Identify other types of faculty recognition.

SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

BEST COPY AVAILABLE

ASSESSMENT CRITERIA

Professional Development

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
Professional Development					
1. The school provides formal and informal opportunities for spiritual development for faculty and staff.	☐	☐	☐	☐	☐
2. The faculty, staff and administration annually reflect on the mission statement and its implementation relative to school policies and procedures.	☐	☐	☐	☐	☐
3. Opportunities exist for the faculty to engage in collective inquiry and reflection on current practice, student performance and significant school issues.	☐	☐	☐	☐	☐
4. Professional development opportunities include faculty and staff involvement in responsible decison-making directed toward school improvement.	☐	☐	☐	☐	☐
5. Formal and informal feedback on instructional practices is a regular part of professional development.	☐	☐	☐	☐	☐
—OR—					
6. The results of student assessment, faculty evaluations and school reviews are used to develop both personal and school plans for professional growth.	☐	☐	☐	☐	☐
7. Faculty and staff regularly participate in professional development opportunities.	☐	☐	☐	☐	☐
8. The professional development program is planned, coherent and ongoing.	☐	☐	☐	☐	☐
9. Department chairpersons have an active role in shaping professional development opportunities for faculty.	☐	☐	☐	☐	☐
10. The school requires faculty to articulate professional growth plans that are consistent with schoolwide goals.	☐	☐	☐	☐	☐

	5	4	3	2	1
11. Professional growth plans and schoolwide goals are the basis for faculty supervision.	☐	☐	☐	☐	☐
12. Formal and informal support systems are in place for beginning teachers to ensure understanding of mission, *ease in* the school culture and teaching success.	☐	☐	☐	☐	☐
13. Formal and informal support systems are in place for those new to the school to ensure understanding of mission, *ease into* the school culture and experience teaching success.	☐	☐	☐	☐	☐
14. Professional development programs are evaluated by participants.	☐	☐	☐	☐	☐
15. Professional development programs are evaluated relative to instructional improvement.	☐	☐	☐	☐	☐
16. Professional development opportunities exist for non-teaching staff members.	☐	☐	☐	☐	☐
17. The school provides ways for faculty and staff to share professional growth experiences with others.	☐	☐	☐	☐	☐
18. Faculty members and administrators hold membership in professional organizations.	☐	☐	☐	☐	☐
19. Faculty members and administrators hold leadership roles in professional organizations.	☐	☐	☐	☐	☐
20. The school recognizes excellence in its faculty and staff.	☐	☐	☐	☐	☐
21. The school funds and supports professional development opportunities.	☐	☐	☐	☐	☐
22. Faculty and staff have adequate access to technology support.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

Professional Development

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This **Focus for Planning** is important for **Strategic Planning**.

Strengths

The professional development information gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- The position and scope of professional development in the school raises the following questions and/or issues relative to mission and planning.

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Governance and Accountability

Governance Overview

- Attach a copy of the school organizational chart.
- Describe how educational policy is developed, ratified and changed. Include the role of the faculty, administration and governing body.

School Board

- Describe the board's range of authority. Is the authority identified as advisory, consultative, governing or ownership?
- Describe the board's understanding of the school's Catholic identity and its role in relation to this identity.
- Identify the standing committees of the board.

  _____ Development
  _____ Executive
  _____ Facilities
  _____ Finance
  _____ Nominating
  _____ School programs
  _____ Other: _____

- List the current ad hoc committees of the board and the major objectives of each.

- Describe the selection process for board membership.

- Describe the orientation of board members. Include how the mission and history of the school are included. If applicable, describe how the relationship to the sponsoring religious congregation is developed.

- Identify how the school's Catholic identity and mission and, where appropriate, the charism of the sponsoring religious congregation are given expression in board deliberations.

- Describe the board in-service program for the present year and the past two years.

- Describe how the effectiveness of the board is evaluated.

Accountability

- Indicate the person or body having primary and ultimate responsibility for:

EXAMPLE:

	Primary	*Ultimate*
Finance	school head	board
Hiring of CEO (President, Principal, Headmaster)	board	superintendent

	Primary	*Ultimate*
Finance		
Hiring of CEO (President, Principal, Headmaster)		
Hiring of administrators		
Hiring of teachers		
Hiring of support staff		
Evaluation of CEO		
Teacher formation		
Teacher evaluation		
Administrator evaluation		
Support staff evaluation		
Shaping policy		
Approving policy		
School plant		
Development		
Academic program		
Discipline		
Student activities		
Parent relationships		

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- Identify elements or areas of governance **reserved** for the following groups.

	Parish	*Diocese*	*Religious Congregation*	*Other* _____
Approval of policy				
Budget approval				
Financial oversight				
Mission of the school				
Ownership of property and buildings				
Other: _____ _____				

- Describe how parents are involved in the decision-making processes of the school.

- Indicate when the most recent institutional evaluation took place and who conducted it.

- Indicate the frequency of the formal evaluation of the chief administrator and when the last evaluation was conducted. Describe the process.

SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

BEST COPY AVAILABLE

ASSESSMENT CRITERIA

Governance and Accountability

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
1. The structure and function of governance engages the school community and others in setting direction and ensuring the future of the school, including its identity as a Catholic school.	☐	☐	☐	☐	☐
2. Accountability within the school is clearly defined.	☐	☐	☐	☐	☐
3. Accountability within the school is understood and functions as defined.	☐	☐	☐	☐	☐
4. There is a definite procedure for policy development.	☐	☐	☐	☐	☐
5. The governance structure provides those committed to the school's mission the power and responsibility to achieve it.	☐	☐	☐	☐	☐
6. The role of the board is clearly defined.	☐	☐	☐	☐	☐
7. Board decisions indicate an understanding of the school's Catholic identity.	☐	☐	☐	☐	☐
8. Board decisions indicate an understanding of the mission of the school.	☐	☐	☐	☐	☐
9. The board is organized into committees and functions efficiently.	☐	☐	☐	☐	☐
10. Board members financially support the institutional advancement of the school.	☐	☐	☐	☐	☐
11. Board members seek to expand support for the school and its programs in the community, and in business and civic arenas.	☐	☐	☐	☐	☐
12. The board regularly engages in evaluation of its function and and effectiveness.	☐	☐	☐	☐	☐
13. Parents are appropriately involved in the school's decision-making processes.	☐	☐	☐	☐	☐

	5	4	3	2	1
14. The head of school is evaluated on a regular basis.	☐	☐	☐	☐	☐
15. Evaluation of the head of school is formative as well as summative.	☐	☐	☐	☐	☐
16. Evaluation of the head of school includes mission effectiveness.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

Governance and Accountability

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This form is important for **Strategic Planning**.

Strengths

- The Governance information gathered in this section identifies the following strengths.

- The Accountability information gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- The structure and exercise of governance and accountability raise the following issues and/or questions relative to mission and planning.

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School Finance, Institutional Advancement and Facilities

Financial Planning and Management

- If helpful or appropriate, attach a copy of the current operating budget and any forecasted budgets.

- Indicate the percentage of the current operating budget that supports each of the following areas:

  _____% Salaries

  _____% Benefits

  _____% Staff development

  _____% Academic program

  _____% Plant

  _____% Tuition assistance

  _____% Student activities

- Indicate the percentage of the operating budget represented by each of the following income sources.

  _____% Tuition

  _____% Fundraising

  _____% Subsidy

  _____% Contributed services

  _____% Annual giving

- Indicate funds that exist in addition to operating funds.

  $_____ Plant reserve
  $_____ Tuition assistance
  $_____ Restricted funds
  $_____ Endowment

- Explain the process for developing the annual operating budget. Include who has input and how funding priorities are determined.

_____

_____

_____

_____

_____

- Describe the school's auditing procedures. Indicate the frequency of audits, by whom they are conducted and who receives the management letter.

_____

_____

_____

_____

_____

- Indicate the percentage of the student body receiving tuition assistance.

_____%

- Complete the following, using dollar amounts or percentages.

Current tuition rate	$_____	_____%
Current per pupil cost	$_____	_____%
Maximum tuition grant awarded	$_____	_____%

Annual percentage increase in tuition over the past three years. Report increases from year prior to year requested.

(current)	_____%
1 year prior	_____%
2 years prior	_____%

- Relative to other area schools, the present salary schedule could best be described as:

	Other Catholic Schools	*Private*	*Public*
Above			
Comparable			
Significantly below			
Do not know			

Institutional Advancement

- Indicate the number of years the institutional advancement office has been in place.

_____

- Identify whether the following activities are functions of the institutional advancement office.

Responsibility	*Yes*	*No*
Alumni(ae) relations		
Annual fund		
Capital campaigns		
Donor research		
Fundraising		
Grant applications		
Major gift solicitation		
Planned giving		
Public relations		
Other: _____		

- If the school does not have an institutional advancement office, describe how the above areas are handled.

_____

_____

_____

_____

- Indicate revenue over expense for institutional advancement efforts. Include salaries and benefits in the calculation.

_____

_____

_____

_____

Facilities

- Indicate the number and age of buildings.

_____

- Indicate the enrollment capacity of the buildings as presently configured.

_____

- Indicate the present enrollment. _____
- Describe the plant adequacy relative to supporting the academic program.

_____

_____

_____

_____

- Describe the plant adequacy relative to supporting other programs, including religious celebrations, school assemblies, athletics and activities.

_____

_____

_____

_____

- Identify projected major repairs/improvements needed within the next five years.

_____

_____

_____

_____

- Indicate the status of plans and funding for these repairs/improvements.

_____

_____

_____

_____

- List the desired plant improvements for the next five years.

_____

_____

_____

_____

- Describe the plant in terms of accessibility for persons with disabilities. Include consideration for visual, auditory and mobility needs.

_____

_____

_____

_____

- Attach a copy of the plant master plan and the maintenance schedule for major repairs.

SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

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ASSESSMENT CRITERIA

Finance, Development and Facilities

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
Finance					
1. The distribution of expenses as indicated in the operational budget is consistent with articulated priorities.	☐	☐	☐	☐	☐
2. The compensation plan is just for all personnel.	☐	☐	☐	☐	☐
3. Funding priorities are mission driven.	☐	☐	☐	☐	☐
4. Department heads have input into the development of the operational budget.	☐	☐	☐	☐	☐
5. Tuition assistance guidelines and procedures are clearly stated.	☐	☐	☐	☐	☐
6. Tuition assistance awards are based on financial need.	☐	☐	☐	☐	☐
7. Financial forecasting is a regular part of budget management.	☐	☐	☐	☐	☐
8. Defined investment policies and procedures are in place.	☐	☐	☐	☐	☐
9. The chief administrator and board monitor financial operations on a regular basis.	☐	☐	☐	☐	☐
10. School accounts are audited annually.	☐	☐	☐	☐	☐
11. The school publishes an annual financial report.	☐	☐	☐	☐	☐
Institutional Advancement					
1. Institutional advancement efforts support the operational budget in a predictable manner.	☐	☐	☐	☐	☐

	5	4	3	2	1
2. Institutional advancement efforts support tuition assistance at a level consistent with the mission of the school.	☐	☐	☐	☐	☐
3. Institutional advancement efforts generate reserve and/or endowment funds for the school.	☐	☐	☐	☐	☐
4. Institutional advancement initiatives are financially supported by all board members.	☐	☐	☐	☐	☐
5. Institutional advancement initiatives are financially supported by administrators and faculty.	☐	☐	☐	☐	☐
6. Institutional advancement initiatives are financially supported by parents.	☐	☐	☐	☐	☐
7. Institutional advancement initiatives are financially supported by alumni(ae).	☐	☐	☐	☐	☐
8. The institutional advancement program is evaluated on a regular basis.	☐	☐	☐	☐	☐

Facilities

1. A plan for preventive maintenance is operative.	☐	☐	☐	☐	☐
2. Provision for technology needs is part of facility planning.	☐	☐	☐	☐	☐
3. Sufficient technology resources exist to meet teacher and student requirements.	☐	☐	☐	☐	☐
4. The school plant provides appropriate space for religious celebrations	☐	☐	☐	☐	☐
5. The school plant provides the type and extent of space needed for the academic program.	☐	☐	☐	☐	☐
6. The school plant provides the type and extent of space needed for activities.	☐	☐	☐	☐	☐
7. The school plant provides the type and extent of space needed for athletics.	☐	☐	☐	☐	☐
8. The school plant is accessible for persons with disabilities.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: (*indicate number in each category*)

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

FOCUS FOR PLANNING

Finance, Institutional Advancement and Facilities

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This **Focus for Planning** is important for **Strategic Planning**.

Strengths

- The finance information gathered in this section identifies the following strengths.

- The institutional advancement information gathered in this section identifies the following strengths.

- The facilities information gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

- Finance, institutional advancement and facilities raise the following issues and/or questions relative to mission and planning.

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School and Community Relations

Church

- Describe how the school is positioned as an integral part of the Catholic Church's mission.

- Indicate the experiences students have that strengthen their connection to their Catholic Church community.

- Indicate how the school relates to churches of other faith traditions with which students are affiliated.

- List opportunities pastors, clergy and other parish staff have to participate in school programs and events.

Parents/Guardians

- Describe how parents/guardians are involved in the spiritual life and religious education inherent in the life and culture of the school.

- Identify other ways parents/guardians are involved in the school, both formally and informally.

  _____ Activities/athletics
  _____ Career education and resources (i.e., internships)
  _____ Classroom
  _____ Development
  _____ Field trips
  _____ Hospitality
  _____ Media center
  _____ Office
  _____ Service learning programs
  _____ Other: _____

- List parent/guardian organization(s) that are operative.

- Indicate how parents/guardians access the administration.

- Indicate how parents/guardians access faculty.

- Describe any special provisions made for single parents, full-time working parents or parents with limited English proficiency regarding access to administration, faculty or school events.

- Identify forums that exist for parents to discuss parenting and educational issues.

- Describe other programs that exist for parents and families through the school that have not been otherwise noted.

Local Area Community

- Describe partnerships that exist between the school and the local community with any the following:

  _____ Businesses
  _____ Civic groups
  _____ Cultural
  _____ Health
  _____ Industry
  _____ Law enforcement
  _____ Religious
  _____ Local colleges and universities
  _____ Youth Services
  _____ Other: _____

- Identify service experiences that connect students with the community. Indicate if these are ongoing relationships.

- Identify ways in which the school serves as a community learning center, such as adult education classes, summer or vacation programs.

- Describe how the school, as an institution, is of service to the local community.

- Describe ways the local community is of service to the school. Do not repeat ways already addressed.

- Indicate the use of school facilities by outside groups.

	Group	*Frequency*	*Gratis*	*Fee*
Auditorium				
Cafeteria				
Classrooms				
Gym				
Media Center				
Other: _____				

Alumni(ae)

- Identify how alumni(ae) are involved in the school.
  - _____ Board members
  - _____ Career day resource
  - _____ Coaches
  - _____ Consultants
  - _____ Faculty
  - _____ Guest lecturers
  - _____ Service learning programs
  - _____ Staff
  - _____ Other:_____

- Identify school programs hosted for alumni(ae).

  _____ Annual event

  _____ Reunions

  _____ Spiritual Development

  _____ Sports events

  _____ Symposia

  _____ Other:_____

- Discuss alumni(ae) follow-up studies conducted to determine the effectiveness of school programs.

Communications

- Describe the regular communication modes utilized by the school.

Mode	*Audience*	*Frequency*

- Indicate how message coherence and coordination are assured.

- Indicate who is the designated spokesperson for the school.

- Indicate the process for quality control of communications including design and text.

SUMMARY SNAPSHOT

- Explain any unusual conditions reflected in the above data.
- Target information that has specific importance in light of the school's *Beliefs* and *Mission statements*.
- Consider issues or areas that are significant relative to an accreditation visit.
- The strategic planning process involves the formulation of three to five schoolwide objectives as described in Part 4. Identify evolving realities in the school community which impact strategic planning and especially the formulation of schoolwide objectives.

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ASSESSMENT CRITERIA

School and Community Relations

Purpose: The intent of the Assessment Criteria is to reach a consensus judgment relative to each statement that will focus the formulation of planning objectives and strategies as well as confirm implementation of the school's mission.

It is recommended that this form serve as a summary compilation of agreed-upon ratings. Based on the aspect of the school being considered, appropriate school constituencies should be represented in the determination of the rating.

Directions: From data collected, discussions held and/or Summary Snapshot, respond to the following institutional assessment statements by marking the scale.

At the bottom of this form indicate those consulted and whether the placement on the scale indicates an average of distributed surveys, consensus or another method of determination.

SCALE CODE	
5	fully fulfills the mission
4	adequately fulfills the mission
3	progress toward the mission
2	deficient and needed
1	not applicable

	5	4	3	2	1
1. The school has vital, structured and ongoing relationships with the local Church.	☐	☐	☐	☐	☐
2. The school has vital, structured and ongoing relationships with students.	☐	☐	☐	☐	☐
3. The school has vital, structured and ongoing relationships with families.	☐	☐	☐	☐	☐
4. The school has vital, structured and ongoing relationships with the local civic community.	☐	☐	☐	☐	☐

Church

1. The role of the school in the mission of the local Church (diocese/archdiocese) is articulated verbally and in school publications.	☐	☐	☐	☐	☐
2. There is regular, formal communication between school and local Church education officials concerning mission, goals and objectives.	☐	☐	☐	☐	☐
3. Faculty are given opportunities to participate in diocesan/archdiocesan educational activities.	☐	☐	☐	☐	☐
4. Students are encouraged and given support in order to participate in diocesan/archdiocesan activities.	☐	☐	☐	☐	☐
5. Parents are encouraged and given support in order to participate in diocesan/archdiocesan educational activities.	☐	☐	☐	☐	☐
6. The school, through its personnel and student body, participates in the life of the wider Church by membership and participation in regional, state and national Catholic educational activities.	☐	☐	☐	☐	☐
7. Opportunities are made for the Ordinary and priests of the diocese, especially local pastors, to participate in the life of the school, including but not limited to liturgy and prayer experiences.	☐	☐	☐	☐	☐

	5	4	3	2	1
8. Representatives of faith traditions of other than Catholic students are invited to participate in appropriate para-liturgies and other aspects of school life.	☐	☐	☐	☐	☐
Parents/Guardians					
1. Parents/guardians are provided formal, structured ways of entering into dialogue with the school administrators.	☐	☐	☐	☐	☐
2. Strategies are in place which meet the needs of families and facilitate parent/guardian involvement and participation in social life.	☐	☐	☐	☐	☐
3. Planning for the school calendar, parent meetings and means of communication between parent and school include the formal, structured participation of parent representatives.	☐	☐	☐	☐	☐
4. School decision-making processes include parents/guardians.	☐	☐	☐	☐	☐
5. The school supports appropriate parent networks.	☐	☐	☐	☐	☐
6. The school provides ongoing programs in support of parenting skills and on issues relevant to the school's families.	☐	☐	☐	☐	☐
Local Area Community					
1. The school actively seeks to build partnerships with local business, civic and educational organizations.	☐	☐	☐	☐	☐
2. School leadership or other school representatives participate in local community organizations in order to further both school and community.	☐	☐	☐	☐	☐
3. The school uses the local community as a resource for the education of students.	☐	☐	☐	☐	☐
4. Service programs for students seek to address real human needs in the local community that would otherwise not be met.	☐	☐	☐	☐	☐
5. The school tries to be available as a resource to the local community, in keeping with its primary educational mission.	☐	☐	☐	☐	☐
6. The school is perceived as providing a service to the community.	☐	☐	☐	☐	☐
Alumni(ae)					
1. There is an active alumni(ae) organization.	☐	☐	☐	☐	☐
2. Planning for the school includes participation of and input from alumni(ae).	☐	☐	☐	☐	☐

	5	4	3	2	1
3. The school seeks alumni(ae) involvement through a variety of events.	☐	☐	☐	☐	☐
4. Alumni(ae) help the school to network and build partnerships in the local community through their personal and professional contacts.	☐	☐	☐	☐	☐
5. Alumni(ae) are solicited as part of the annual campaign and programs of the advancement/development office.	☐	☐	☐	☐	☐
6. Alumni(ae) provide opportunities for internships and/or part-time employment for students after school and/or during holiday periods.	☐	☐	☐	☐	☐
Communications					
1. Overall school communication is considered effective and two-way.	☐	☐	☐	☐	☐
2. There is a regular program of communication with publics outside the school: parents, alumni(ae), feeder schools, friends and benefactors.	☐	☐	☐	☐	☐
3. There is a consistency of image in all school publications.	☐	☐	☐	☐	☐
4. In newsletters and other publications, the principal/president focuses on the mission of the school.	☐	☐	☐	☐	☐
5. There is a regular program of communication with diocesan/archdiocesan personnel and feeder parishes.	☐	☐	☐	☐	☐
6. School publications are recognized as significant public relations and recruitment vehicles.	☐	☐	☐	☐	☐
7. The school's use of varying forms of communication (newsletters, messages to families, the internet and web sites, etc.) are frequently monitored for style and content.	☐	☐	☐	☐	☐
8. Technology is effectively utilized to benefit communication.	☐	☐	☐	☐	☐
9. The mission of the school is clearly demonstrated in all forms of school communications.	☐	☐	☐	☐	☐

The assessment is a compilation of _____ surveys distributed to: *(indicate number in each category)*

_____ administration _____ faculty _____ students _____ board members

_____ parents _____ other: _____

Other methods used to determine assessment ratings:

_____

_____

_____

_____

Report completed by: _____ Date: _____

Committee: _____

FOCUS FOR PLANNING

School and Community Relations

Refer to the **Summary Snapshot** and **Assessment Criteria** forms in preparing the **Focus for Planning**. This form is important for **Strategic Planning**.

Strengths

The information on school and community relations gathered in this section identifies the following strengths.

Questions and Issues: Respond to those areas pertinent for planning.

School and community relations raise the following issues and/or questions relative to mission and planning.

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Strategic Planning

Throughout this protocol, planning has been referred to as strategic. This word connotes decision-based analysis shaped by the best possible information and insight relative to what lies ahead. The **Foundation Documents** provide the framework for decision-making. These documents position the school, community and institution, both as it is and also as it intends to become. The **State of the School** provides the information and the analysis for decisions within the context of the **Foundation Documents**.

Strategic connotes decision-based analysis shaped by the best possible information and insight relative to what lies ahead.

The **State of the School** process and synthesis essentially constitute a portrait of the school at a given point in time by capturing how articulated priorities are experienced in programs, services, staffing and resource allocation. By carefully placing this composite beside the school's *Mission*, *Beliefs* and *Philosophy*, as accomplished in the *summary snapshot*, *assessment criteria* and *focus for planning*, the process becomes evaluative. The vast majority of information that surfaces in the data, narrative and in the *assessment criteria* will describe an institution providing quality education with a strong sense of Catholic identity. The challenge is to sustain these priorities while addressing the emerging needs. This is done through the elements of the **Strategic Plan**.

The planning process assumes two commitments by the school community, and both relate to *Mission*. First, that commitment to decision-making and direction-setting are shaped and driven by the *Mission*. Second, that commitment to Catholic identity lies at the heart of the *Mission* and remains integral to the school's climate, culture, programs and services. These two commitments assure that the school is positioned as a student-centered faith community actively committed to educational excellence.

It is self-evident that documented deficiencies or weaknesses need to be targeted and addressed. The harder task lies in prioritizing the multitude of positive outcomes.

Beyond this, the planning process offers a significant challenge: to identify which programs and services should take precedence among a plethora of existing options considered "good" or "effective." The school community can begin this process by asking:

- What takes precedence in light of our mission?
- What is more universal?
- What needs to be strengthened, focused on or pursued at this time?

Are there elements of current practices that should, or could, be limited or changed to allow concentration on new priorities?

As a process, **Strategic Planning** is a systematic identification of desired results and the methods for attaining these. As an outcome, the **Plan** consists in *objectives* and the *strategies* and *action plans* to achieve those *objectives*.

Planning as a Process

Strategic Planning takes many forms. What follows is a suggested procedure, beginning with a definition of roles and followed by a process sequence. The chart on the following page positions the steps in this process in the context of what has been accomplished through the development and affirmation of **Foundation Documents** and the collection of the **State of the School** data, described in Parts 2 & 3 of this protocol.

The determination of the planning committee, selection of the facilitator, the process timeline as well as many elements of the planning process will both be in place and in motion prior to the formulation of the **Plan**. The various elements are presented here, but as with preceding sections, are not meant to describe a linear process begun at this point.

The sample calendar that follows would be for a compact and intense commitment to institutional assessment and **Strategic Planning**. In developing an appropriate timeline, a balance must be struck between accomplishing the assessment and developing the **Plan** in a reasonable time frame without the process becoming onerous and counter-productive. The calendar also assumes that portions of school vacation periods would be utilized by at least some members of the faculty and the planning committee.

An Overview of the Planning Process

	Lead Agents	*Involved*	*Timeline*	*Sample Calendar: June 2001–Fall 2003*
1. Convene planning committee	SH	AD	1 month	June 2001
2. Review protocol and process	SH	PC	1 month	June
3. Identify facilitator and define the role	SH	PC, AD	3 months	June–August
4. Determine timeline	FA	AD, PC	3 months	June–August
5. Develop, revise, affirm **Foundation Documents**	SH, PC	CON	5 months	August–December *will vary*
6. Develop **State of the School** composite	SH, PC	AD, CON, FC	5 months	October 2001–February 2002
7. Identify key questions and issues	FA	AD, PC	2 months	February–March
8. Conduct initial planning session	FA, SH	AD, FC, CON	1 day	
9. Formulate *objectives*	FA	PC		
10. Formulate *strategies*	FA	FC, PC	1 month	March
11. Communicate draft *objectives* and *strategies* for revision and ratification	SH	CON, GOV	1 month	March
12. Form *action plan* committees	PC	FC, CON	1 month	March
13. Develop *action plans*	FA	FC, AD	1 month	March–April
14. Review *action plans*	SH	PC	1 month	April
15. Communicate **Strategic Plan** for ratification	SH	FC, CON	1 month	April
16. Approve **Strategic Plan**	SH	GOV	1 month	May/June
17. Communicate the **Plan**	SH	CON	Ongoing	September 2002
18. Implement *action plans*	SH, PC	FC, AD	Ongoing	September ongoing
19. Validate the **Plan**	PC	CON	Ongoing	Fall 2003

CODES

AD = Administration
CON = Constituents
FA = Facilitator
FC = Faculty
GOV = Governing Body
PC = Planning Committee
SH = School Head

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Roles

The Head of School

The importance of establishing a planning climate cannot be minimized and it is accomplished most appropriately by the head of the school. If enthusiasm is generated for the process and the anticipated outcomes, motivation and involvement will be correspondingly high. This is the time for best thinking, creative insights, ownership, new energy and great growth. It is also helpful to assure faculty and all concerned that there will be, in fact, a culmination point and that the date can be targeted. The word "end" is deliberately avoided as planning is a cyclical, ongoing process. This initial undertaking, however, which is truly a leveraging of the school as an institution, is assumed with greater intensity.

The head of school invites membership on the planning committee and with the planning committee selects and defines the role of the facilitator. The head of school takes the lead in the communication and approval processes throughout the development of the **Plan**. Most importantly, the head of school assures that the **Plan** becomes operational and is a standard of accountability.

The Planning Committee

An overview of the role and responsibilities of the planning committee is presented in Part 1 and is worthy of review as the school engages in shaping the **Plan**. With the school leadership, the planning committee determines the process and timeline for the development of the elements of the **Plan**, as well as the selection and role of the facilitator. The authority to assure compliance with the timeline and quality control issues relative to formulation of *objectives, strategies* and *action plans* is shared with the facilitator. The planning committee is charged with assuring clarity of roles and responsibilities throughout the process. A specific charge of this group is the engagement of the school community in the process and effective use of communication to maximize involvement, understanding and ownership of the **Plan**. The planning committee should select a chairperson other than the head of school.

The Facilitator

It is important that the facilitator have the requisite skills to lead a planning process and be able to dedicate substantial time to both the people and the process over a twelve to fifteen-month period. The facilitator can be a member of the faculty, administration or be external to the school. The advantage of a member of the faculty or administration is the person's knowledge of the school and the school community, on-sight availability and a certain cost benefit. Contracting with an external facilitator can bring the advantage of objectivity, benefit of other related experiences, attributed authority and professional process and planning skills.

Primary responsibilities of the facilitator include:

- Keeping the planning process on track, not just on course. The time has passed for tangential musings. Catholic identity and the **Plan**'s relation to the *Mission* are the touchstones; *objectives, strategies* and *action plans*, the end products.

- Keeping attention focused on the task at hand in terms of motivation, concentration, effort and energy.

The Process

It is important to note that if the **State of the School** study was not undertaken and this protocol is being used for **Strategic Planning**, it is necessary to take the pulse of the school before launching a planning process. Gathering essential data about the school allows for informed decision-making as part of planning. Reviewing information in the following areas will help assess school vitality: religious education and formation, enrollment history and projection, achievement scores, pupil-teacher ratios, funding history and prospect, demographics and staff profile. The analysis should include both internal and external factors important for shaping the **Plan**.

The process outlined here focuses on the formal development of the **Strategic Plan** utilizing the analysis developed in the **State of the School**. This discussion assumes that the following elements are in place as noted in numbers 1 to 7 of the overview on page 127.

- planning committee convened by the head of school,
- facilitator identified and role defined,
- facilitator/planning committee determined timeline for planning,
- **Foundation Documents** developed/reviewed/revised, and
- **State of the School** assessed with identification, organization and synthesis of the key questions and issues which surfaced in the *summary snapshot*, *assessment criteria* and *focus for planning* materials.

At this point in the process, committing two days to planning will enhance focus, clarity and discipline. It also can do a great deal to alleviate multiple small group meetings stretching over several months.

The first planning day is arranged for administration, faculty and representatives of primary constituent groups, particularly the board and parents. Ideally, this meeting is held off-campus, but definitely in a setting conducive to small and large group interaction. The day is led by the facilitator and should commence with an appropriate prayer based on the *Mission* and *Beliefs* and conclude with an equally appropriate social activity.

The core elements of the first day include the following:

Part I Foundation Framework

A. The head of school introduces the day and process. The goal is to agree on the key results the school wants to achieve for all students during the next three to five years. These will be stated as schoolwide *objectives*: few in number and quantifiable. Since the school is engaged in an ongoing process of school renewal and improvement, planning will also be ongoing with these *objectives* revisited annually and new ones formulated as the initial ones are accomplished and new needs emerge. The *objectives* will grow out of the school assessment in process.

B. A creative and reflective review of the core **Foundation Documents**: *Mission, Beliefs, Philosophy, Graduate profile.*

C. Statement of *Parameters*, if appropriate.

D. Presentation of highlights from the **State of the School** report or other data collected about the school with emphasis on pertinent data rather than a comprehensive report. (**State of the School** *focus for planning* report forms can be helpful.)

Part II Analysis Framework

A. The planning committee presents critical growth issues for the school which were identified through the **State of the School** assessment process and in light of the above information and reflection.

B. Through group process, participants formulate desired key results for the identified issues. The result of this formulation and prioritization should be consensus on the elements that will constitute the three to five schoolwide *objectives*. At least one *objective*, and more likely two, will deal directly with student faith development. It is not necessary to formulate the actual statements but reaching consensus on the sense of the *objectives* is significant. *Construction specs for objectives* are discussed later in this part of the protocol.

Note that during this process, elements that will contribute to the *strategies* will surface. A recorder should capture these for future reference and the participants should know that these contributions will not be lost.

Part III Conclusion

A. Facilitator recaps accomplishments of the day and gives overview of next steps.

Objectives

B. School head positions importance of what has been accomplished; expresses appreciation for involvement and ownership; and, engenders enthusiasm for the rest of the process.

↓

The core elements of the second day include the following:

Strategies

The planning committee meets to complete the formulation of the *objectives*, paying particular attention to the necessary measurement and timeline elements that assure the quantification required by most regional accrediting agencies.

This day is also used to organize the process for formulation of *strategies* and *action plans*.

↓

Action Plans

Next steps:

The faculty and other appropriate persons meet to formulate *strategies*. This is a critical step as the *strategies* define and focus the behavior of the school community as well as direct the allocation of resources. All faculty and staff should have the opportunity to suggest *strategies*.

The planning committee facilitates the refinement and coordination of *strategies*. This includes assuring that there are sufficient and appropriate *strategies* to achieve the *objectives*.

The head of school communicates the draft *objectives* and *strategies* to the governing body and constituents for review and ratification. It is especially important that the draft *objectives* and *strategies* are reviewed by the group which met in the initial planning session, so that they see the fruits of their labor. This is further discussed in the communication section in this part of the protocol.

The planning committee maps the process for developing the *action plan(s)* that supports each *strategy*. Eliciting volunteers for *action plan* committees with pre-invited chairpersons is often the most productive approach as individuals invest themselves according to their areas of interest and expertise. Membership on the committees crosses departments. A planning committee member should be on each *action plan* committee. Committees develop *action plans* according to the *construction specs for action plans* which are discussed later in this part of the protocol.

The planning committee receives and reviews *action plans*. This review assures that there are sufficient and adequate *action plans* to support the *strategies*. It is also important to identify relationships that exist between and among *strategies* and *action plans* in order to focus resources and efforts. This review of *action plans* may be an iterative process between the planning committee and the groups or committees developing the *action plans* to assure consensus and ownership.

When all *action plans* are formulated, a half-day session is held for the faculty and staff to communicate and ratify the **Strategic Plan**. This is not a time for surprises but for ownership and discussion of implementation options.

The governing body receives and approves the **Strategic Plan** upon its completion. The understanding of the **Plan** by this body is important in view of the relation of the **Plan** to the *Mission*, accountability structures and allocation of resources to accomplish the *objectives*.

Communication, implementation and validation of the **Plan** complete the process and are discussed at greater length later in this part of the protocol. Each is critically important in its own right. The **Plan** is a public document only significant if implemented and only valid if it can be documented that it does in fact further the *Mission*.

Objectives

Definition: An objective is an expression of the desired, measurable end results for a school. They are focused on student success, performance and/or achievement. (Bryan, p.19)

Role of *Objectives* in the Plan

Objectives form the centerpiece of the **Strategic Plan**. They are the dynamic links that move the school toward the vision of its preferred future and the fulfillment of the *Mission*. This is true to the extent that the *objectives* represent a commitment to achieve defined, quantifiable results and are the bridge between the *Mission* and the

operational *strategies*. The relationship between the *objectives* and the *Mission statement* should be easily discernable. It is through achieving the *objectives* that the school realizes and extends its *Mission*.

The *objectives* themselves should be challenging, as well as reasonable and achievable. They represent a calculated risk for the school community and a standard of accountability. Their statement is the school community's commitment to actualize the *Mission* with a particular focus on desired end results for all students.

In addition to tracing the roots of *objectives* to the *Mission statement*, the *objectives* should also be grounded in the **State of the School** assessment. In other words, there should be a ready and easy reply to "where did this come from?"

Construction Specs for *Objectives*

Objectives are few in number and schoolwide in scope. Ideally, the total number of *objectives* falls between three and five, a sharp contrast to a long list of more segmented *objectives* each of which might target a particular department, program or service. This small number is consistent with the imperative to move toward the realization of the *Mission* and vision for the school as a whole. Limiting the number of *objectives* increases the likelihood of accomplishment and endorses the commitment to assessment and planning as an ongoing process.

There are four other important points to consider when designing *objectives*.

1. At least one *objective* should address the three areas of student faith development: knowledge, values and behaviors. This is the heart of the school as Catholic.
2. *Objectives* are quantifiable and include measurable components of time and quality. This establishes accountability and helps to sustain momentum.
3. *Objectives* are directed toward student growth, achievement and success.
4. *Objectives* identify both the year of formulation (baseline) and the date for realization which should be within a five-year time period.

Examples of *Objectives*

Each of the following examples illustrate a sample *objective* statement. This list is not meant to represent a set of *objectives* for a given school. The first two address commitment to student faith development encompassing knowledge, values and behaviors.

Objective: By the year 20 _ _, the number of students who choose the preferred answer 75% of the time on the Assessment for Catholic Religious Education (ACRE) measuring religious knowledge and understanding will increase by 5% between grade nine and eleven.

Objective: By the year 20 _ _, the development of student decision-making and community service commitments will reflect the internalization of Gospel values and Catholic social teaching as measured by the freshman survey and senior exit interviews.

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Objective: By the year 20 _ _, the twelfth grade students' mean verbal SAT score will increase by at least 15 points; and, the mean math SAT score by at least 45 points.

Objective: By the year 20 _ _, students' intellectual competency will advance by 5% as validated by the Developing Cognitive Abilities Test.

Objective: By the year 20 _ _, all students will effectively utilize technology resources in the classroom setting, for independent research and for communication of learning as measured through classroom assessment processes.

Although a range of quantitative and qualitative means will be used to measure accomplishment, all the above *objectives* are quantifiable.

Strategies

Definition: A strategy is a broadly stated means of deploying resources to achieve one or more objectives. (Bryan, p.21)

Role of *Strategies* in the Plan

Strategies describe essential, vital initiatives for implementing *objectives* and realizing the *Mission* based on analysis of the **State of the School** and informed judgement.

Stated in terms of desired results, *strategies* indicate how the resources, people, talent, initiative, finances and facilities will be directed to achieve the *objectives*. In this regard, *strategies* appropriately combine power and planning. It is important that the *strategies* concretely emphasize the Catholic character of the school.

Construction Specs for *Strategies*

The formulation of *strategy* statements is both a science and an art. Like the *objectives*, they are schoolwide in scope, pointing to an intended outcome for all students. In broad terms, each states partially **how** one or more *objectives* will be accomplished. Each *objective* in turn is supported by more than one *strategy*. *Strategies* for a given *objective* will be developed across departments.

The statements link action verbs and desired results allowing for flexibility in how the *strategy* will be accomplished. The specifics will be seen in the *action plan(s)* that follow.

Examples of *Strategies*

The following examples illustrate the formulation of *strategies* and the relationship between *strategies* and *objectives*. Note that a given *strategy* can support more than one *objective*. Additional *strategies* could be developed for each *objective*. These are offered as examples and are not meant to exhaust possible *strategies* that would relate to one or more *objectives*.

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Objective: By the year 20 _ _ the number of students who choose the preferred answer 75% of the time on the Assessment for Catholic Religious Education (ACRE) which measures religious knowledge and understanding will increase by 5%.

Strategy: We will assist each student in attaining the highest level of academic achievement commensurate with his or her ability.

Strategy: We will incorporate the concepts of justice and integrity into the life of the school community.

Strategy: We will integrate academic, co-curricular and campus ministry experiences.

Objective: By the year 20 _ _, the development of student decision-making and community service commitments will reflect the internalization of Gospel values and Catholic social teaching as measured by the Freshman survey and senior exit interviews.

Strategy: We will incorporate the concepts of justice and integrity into the life of the school community.

Strategy: We will create and sustain understanding and appreciation of racial and cultural diversity and demonstrate a lived commitment to it.

Strategy: We will integrate academic, co-curricular and campus ministry experiences.

Strategy: We will establish service learning and its relationship to Catholic social teaching as a hallmark of the school community.

Objective: By the year 20 _ _, the twelfth grade mean SAT verbal scores will increase by at least 15 points; and, the mean SAT math by at least 45 points.

Strategy: We will assist each student in attaining the highest level of academic achievement commensurate with his or her ability.

Strategy: We will ensure the personalized development of each student.

Strategy: We will design and implement a student-centered inter-disciplinary curriculum.

Whether school community members think of their role in terms of academic departments, student services or co-curricular programs they should see that they have ways of implementing each of the *strategies*.

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Action Plans

Definition: an action plan is the explicit portion of a given *strategy* that outlines the tasks required to implement the program, the person(s) responsible, the anticipated date of completion and the cost benefit analysis. (Bryan, p. 23)

Role of *Action Plans* in the Strategic Plan

The *action plans* comprise the concluding component of the **Strategic Plan**. In effect, *action plans* are the blueprints that move the *strategies* to the operational level. Each *action plan* describes a specific set of steps that, if accomplished, result in the successful achievement of a *strategy*. Prior to developing the steps, it is important to be clear about the problems or opportunities the *strategy* is targeting, so that the steps of the *action plan* clearly and systematically address specific needs. In carrying out the *action plans*, priority is given to the most urgent steps relative to *Mission, objective* and/or *strategy*. This is followed by a determined logical order that reflects manageability and resources. Not all *action plans* will break new ground. It is probable that some will confirm existing programs and services that merit continued emphasis.

Construction Specs for *Action Plans*

Action plans are appropriately developed by administrators, faculty and staff directly responsible for accomplishing the *strategies*. Several departments and/or groups may contribute to the *action plans* for a given *strategy*.

A complete *action plan* includes sequenced directions, timelines, assignment of responsibilities, and resource allocation. The perspective and language are operational, which implies the reader knows exactly what will occur, when, by whom and the cost.

Action plan formats should suit the needs of a particular school and will vary. There are, however, several recommendations. *Action plans* should:

- specify the results that demonstrate that a *strategy* has been achieved.
- describe each step to be accomplished and the sequence of steps.
- assign responsibilities.
- specify timelines.
- allocate resources that take into consideration staff time, materials, equipment, contracted services.

Examples of *Action Plans*

The follow examples are sample *action plans* that support specific *strategies*. These are offered as illustrations and are not meant to be exhaustive.

Objective: By the year 20 _ _, the development of student decision-making and community service commitments will reflect the internalization of Gospel values and Catholic social teaching as measured by the freshman survey and senior exit interviews.

Strategy: We will incorporate the concepts of justice and integrity into the life of the school community.

Action Plan #1: To make justice and integrity operative components of the educational experience.	Year 1	Year 2	Year 3
1. Each department will establish within the curriculum guidelines, a core set of justice issues to be examined.	xxxx	xxxx	
2. The administration and business office will ensure equitable distribution of funds and resources for curricular and co-curricular activities and athletics.			xxxx
Action Plan #2: We will establish a service program rooted in Catholic social teaching.	Year 1	Year 2	Year 3
1. Each department will systematically incorporate Catholic social teaching into the curriculum.	xxxx	xxxx	
2. The campus ministry department will establish adult mentoring as part of the reflection component of service learning.		xxxx	
3. The alumni(ae) office will measure alumni(ae) commitment to and involvement in community service.			xxxx

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Objective: By the year 20 _ _, the twelfth grade mean SAT verbal scores will increase by at least 15 points; and, the mean SAT math by at least 45 points.

Strategy: We will assist each student in attaining the highest level of academic achievement commensurate with his or her ability.

Action Plan #1: To create an atmosphere that enhances learning.	Year 1	Year 2	Year 3
1. The administration in consultation with faculty will create a school schedule that optimizes instructional time.		xxxx	
2. The media specialist and staff will extend the media-learning center hours and networking capabilities for student research, study groups and project development.	xxxx		
3. The administration will establish quarterly professional development days devoted to curriculum development and instructional improvement.	xxxx		
Action Plan #2: To adopt modes of student assessment consistent with curriculum objectives and instructional methods.	Year 1	Year 2	Year 3
1. The curriculum council will conduct a faculty in-service series exploring current research on student, matching assessment and instruction and sharing best practices.	xxxx	xxxx	
2. Each department will build individual and collaborative problem solving into learning experiences.	xxxx	xxxx	
3. Each teacher will identify assessment modes to be used as part of each course curriculum.			xxxx

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Communication

Communicating the planning process and the **Plan** itself should be ongoing but merits special attention when the **Plan** is first articulated. Reasons for a communication schema are:

- **Acknowledgement**
  Through appropriate communication, the contributions of various groups in the school community who have given time and expertise to the process can be acknowledged.
- **Support**
  Communication invites responses which should demonstrate a broad base of moral and other support for the **Plan** both in its entirety and component parts.
- **Involvement**
  In addition to reaction and support, communication can and should generate involvement in implementation of the **Plan**.

In addition to these reasons for communication, there is another significant and overarching goal. Each time there is communication regarding the **Plan**, there is an opportunity to further integrate the *Mission* with the blueprint for action. This can and should be preeminent.

Since many elements of the **Plan** are developed by various small groups, it is important to provide all school constituencies with the opportunity to respond to the draft and ratify the final version.

Discuss

Review

Receive

Ratify

The school leadership will need to identify the various constituencies and to determine types of involvement. For some, it is important to have a thorough discussion; with others, sharing the completed **Plan** is appropriate. Some individuals and groups, by virtue of their role in the school community, have the prerogative to review the **Plan** in draft form. In addition, school leaders may wish to solicit responses from other individuals and groups to all or part of the **Plan**. How the presentations are positioned establishes the balance between unnecessarily complicating the process on one hand and surfacing critical considerations for revision or adjustment on the other. Ultimately, the entire school community receives the **Plan** in some form.

Each school must name its own constituencies but some are common to most Catholic high schools. These include faculty and staff, parents, board members, the arch/diocesan superintendent, religious congregation, parish/deanery representatives, community leaders and donors.

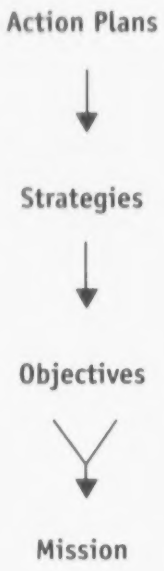
Once the **Strategic Plan** is ratified, it is important to formally communicate it to the entire school community. This brings assessment and planning full circle back to the various constituencies that have been involved in the process either at specific points or throughout. The goal now is to create an operative understanding of the document. Communication can take several forms, both written and oral.

Without entombing the final **Plan**, a well-formatted, concise presentation makes it possible to distribute it widely, refer to it often and keep it before all who have a part in accomplishing the *action plans*, *strategies* and *objectives*.

The school leadership should take advantage of gatherings that regularly occur to communicate the completed **Plan** and provide updates on progress toward achieving the *objectives*. Again this keeps the **Plan** alive, enlarges the ownership circle and establishes accountability.

Communication allows school administrators, board and staff to measure mission effectiveness, as it is expressed through programs, priorities, people and allocation of resources in the accomplishment of the *action plans*. Just as the Catholic character of the school permeated the process throughout the development of the *Beliefs*, *Mission*, *objectives*, *strategies* and *action plans*, so, too, it is the reference criteria for the reverse process back to the *objectives* through the *action plans* and *strategies*. It is an opportunity to be maximized.

Implementation



Two elements are essential relative to implementing the **Plan**. The first is commitment to periodic checkpoints or updates. The second requires that the *action plans* be integrated into the responsibilities of administrators, faculty and staff responsible for implementation. Layering these commitments on top of already existing full agendas will be, at best, counterproductive. The *action plans* become the agenda and assume a priority status.

Consideration should be given to a quarterly review process for the *action plans* that are in process and an annual audit for the overall **Strategic Plan**. The quarterly reviews can be done internally with appropriate reporting to the faculty as a whole, and other key internal and external persons or groups. This establishes priority, accountability and a way to maintain momentum. A **Plan** is not self-implementing. Without periodic checkpoints, natural drift will occur.

The checkpoints also provide a means for making necessary adjustments. Some *action plans* can be accelerated; others may encounter unavoidable implementation delays. The quarterly updates allow contingencies to be addressed on a periodic basis, thus avoiding or minimizing organizational slippage. The updates are also a way to generate ongoing support, solicit engagement and coordinate with other school processes, programs and budget projections.

The annual audit should involve a person from outside the school community. Several of the regional accrediting processes call for this. One to three persons agreed-upon by the school review(s) progress in the accomplishment of the *action plans*, *strategies* and *objectives*. As in any audit, it is an opportunity for affirmation, adjustment, refinement and validation. An annual report should be presented to faculty and staff, parents, board and other major constituents. This report would be the core of the traditional annual report prepared by many schools for institutional advancement purposes.

As *action plans*, *strategies* and *objectives* are accomplished, consideration is given to what will come next. As *objectives* are actualized, the school should be ready to celebrate and then develop the next *objective*. Hence the **Plan** is ever-evolving, consistent with the dynamic nature of the school community it supports. This requires that pertinent **State of the School** information be updated on a periodic basis.

Validation

Corroborating the soundness of the **Strategic Plan** as originated and as implemented is crucial. The board, the religious congregation and/or the superintendent may, along with school leadership, play key roles in this validation.

Essentially, validation documents the definite, strong, observable and growth-oriented connection between the *Mission* and all other parts of the **Plan**. This implies that Catholic identity is a traceable, integrated and cohesive reality. This authenticity is at the heart of the Catholic school and is confirmed through the validation of the **Plan**.

Judgments should be made as to who beyond the faculty and staff should be involved in the process. It is important that representatives of all school constituencies and appropriate governing bodies have a voice in the process.

Validation is initiated approximately a year into the implementation of the **Plan**. Whether the same planning committee that directed the school assessment and development of the **Plan** continues through the validation process is a local determination. It is an assistance to the administration in terms of ownership and objectivity to structure the validation process through some coordinating committee.

The process for validation is heavy on reflection and light on reports. Some questions to shape the reflection might be:

- How is the **Plan** consistent with the *Mission*?
- How does progress toward the *objectives* describe this school as a dynamic Catholic institution coherently and consistently implementing its *Mission*?

One method of validation is to make informed judgments as to the efficacy, adequacy and accomplishment of the elements of the **Plan**.

Criteria applied to the components focus judgment in these areas. The use of a scale, as shown in the example that follows, is one way to solicit input and to make judgements relative to both effectiveness and accomplishment. These are separate considerations.

The primary consideration is whether the *objectives* and then the supporting *strategies* and *action plans* in fact are making the *Mission* operational. Judgements on this could be gathered using the scale as shown below. Once the *objectives* are validated or amended, a similar process is applied to the *strategies* and, in turn, the *action plans*.

Regarding *Objectives:*

−2 *objective* does not support the *Mission* and should be dropped
−1 *objective* is limited in effectively supporting the *Mission* and should be modified
0 effectiveness cannot be measured
+1 *objective* supports the *Mission*
+2 *objective* is critical to the *Mission*

Regarding *Strategies:*

−2 *strategy* does not support intended *objective(s)* and should be dropped
−1 *strategy* is limited in effectively supporting intended *objective(s)* and should be modified
0 effectiveness cannot be measured
+1 *strategy* supports intended *objective(s)*
+2 *strategy* is critical to accomplishing intended *objective(s)*

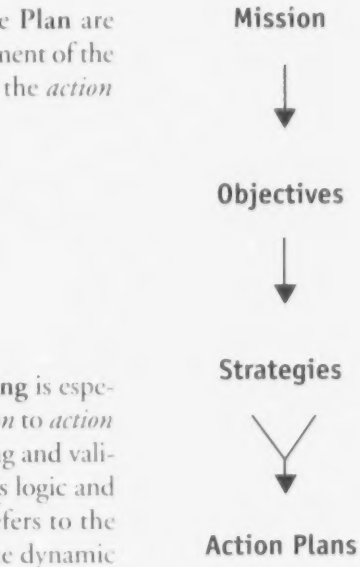
Regarding *Action Plans:*

−2 *action plan* does not support intended *strategy* and should be dropped
−1 *action plan* is limited in effectively supporting intended *strategy* and should be modified
0 effectiveness cannot be measured
+1 *action plan* supports intended *strategy*
+2 *action plan* is critical to accomplishing intended *strategy*

Assuming that the efficacy and adequacy of these elements of the **Plan** are affirmed or refined, the second area of judgment relates to the accomplishment of the **Plan**. The following scale could be applied to the **Plan** beginning with the *action plans*, then *strategies* and, over time, the *objectives*.

−2 implementation is counterproductive
−1 implementation has some positive and some negative results
0 status quo; no progress at this time
+1 progress noted, more to be done
+2 implementation complete and successful

It is through validation that the dynamic nature of **Strategic Planning** is especially evident. There is a certain linear logic in the progression from *Mission* to *action plan* and the reverse tracing which occurs as part of validation. As planning and validation proceed, the ever-evolving nature of the school interfaces with this logic and wise strategic planners make necessary adjustments. Some literature refers to the entire **Strategic Planning** process as strategic **positioning** to highlight the dynamic and ongoing nature of planning as a **process**.



Summary of Beliefs and Directions from the National Congress

THE NATIONAL CONGRESS ON CATHOLIC SCHOOLS FOR THE 21ST CENTURY

PROLOGUE

We leaders of Catholic schools believe that our schools are a great gift to our church and a great gift to our nation. Our convictions are supported by fact and faith. Our convictions are shared by many, including thousands of our colleagues, many of whom have participated in the regional meetings leading up to this Washington event; many of whom will participate in the continuing work of the Congress in the years to come. Our convictions are shared by researchers, public officials and policy makers who have reminded us of the many achievements of our schools during the days this Congress met in Washington.

Catholic schools are deeply rooted in the life of the church, the body of Jesus Christ, who is the source of all life. Catholic schools draw their life's breath from their roots in the Catholic community and they, in turn, breathe new life into the church.

Catholic schools are proud and productive partners in American education. At this moment in history, Catholic schools are no longer a small number of outposts offering separation and security in a hostile culture, but a vast network of institutions lighting the lives of the communities they serve in every corner of the land. Today our Catholic schools are a beacon of hope for many, especially the poor, and a powerful model for those who are working to redefine and rebuild American education.

We commit ourselves to continue to tell the story of Catholic schools proudly and loudly. We also commit ourselves to work together to strengthen and expand the network of Catholic schools in this nation. The future of Catholic schools is ours to shape. As leaders drawn from many corners of the land, we accept this call, and invite others to join us in this great effort. In order to shape a stronger and more extensive network of Catholic schools we must build on our present strengths, the great legacy of those who preceded us. We must clearly identify our fundamental beliefs and respond boldly and imaginatively to the challenges of the future by offering clear directions rooted in our beliefs. With the power of the Spirit and the participation of many, this is what we have done. What follows is the product of prayer, debate, consensus. We offer it as a platform for action.

BELIEFS

Before proposing a set of directions for the future, the delegates identified the fundamental beliefs that provide the basis for their recommendations for action:

The Catholic Identity of Catholic Schools

We believe that:

- The Catholic school is an integral part of the church's mission to proclaim the Gospel, build faith communities, celebrate through worship and serve others.
- The commitment to academic excellence, which fosters the intellectual development of faculty and students, is an integral part of the mission of the Catholic school.
- The Catholic school is an evangelizing, educational community.
- The spiritual formation of the entire school community is an essential dimension of the Catholic school's mission.
- The Catholic school is a unique faith-centered community which integrates thinking and believing in ways that encourage intellectual growth, nurture faith and inspire action.
- The Catholic school is an experience of the church's belief, tradition and sacramental life.
- The Catholic school creates a supportive and challenging climate which affirms the dignity of all persons within the school community.

Leadership In and On Behalf of Catholic Schools

We believe that:

- Leadership in and on behalf of Catholic schools is rooted in an ongoing relationship with Jesus Christ.
- Leadership in and on behalf of Catholic schools is deeply spiritual, servant-like, prophetic, visionary and empowering.
- Effective leadership is critical to the mission of the church and the future of Catholic schools.
- The recruitment, selection and formation of leaders is essential to the future of Catholic schools.
- Leadership in and on behalf of Catholic schools involves a shift from vertical models to collegial models.

Catholic Schools and Society

We believe that:

- Catholic schools are an integral part of education in the United States and a valuable asset to the nation.
- Catholic schools support parents, family, church and society in the education of youth.
- Catholic schools are committed to educate students of diverse economic, cultural, religious, racial, and ethnic backgrounds.
- Catholic schools are called to be catalysts for social change based on Gospel values.
- Catholic schools are called to be exemplary models of academic excellence and faith development.

Catholic School Governance and Finance

We believe that:

- The financial future of Catholic schools demands securing new and available resources.
- Catholic schools are essential to the life and future of the church in the United States and require the support of the entire Catholic community.
- The integrity of Catholic schools requires comprehensively applying the principles of social justice.
- Formation in the basic mission, principles and traditions of Catholic education is essential for all involved in Catholic school leadership.
- Effective Catholic school governance requires the preparation, empowerment and collaboration of the community which it serves.
- Governance with the full participation of the laity is the key to the future of Catholic schools.
- Catholic schools should be available and financially accessible to Catholic families and to others who support the mission.

Political Action, Public Policy and Catholic Schools

We believe that:

- Democratic principles demand that all parents have a right both to choose appropriate education for their children and to receive a fair share of education tax dollars to exercise that right.
- Federal, state and local level political action involving the total Catholic community is essential to protect the rights of all students and parents.
- Advocacy for low income families is essential to tax-supported parental choice in education.
- Coalitions are essential for successful political action.
- Tax supported systems of educational choice can improve all schools.

DIRECTIONS

The most important recommendations for achieving the goals of the National Congress on Catholic Schools for the Twenty-first Century are contained in the directional statements developed for each of the topic areas. These directional statements were prioritized by topic groups and ratified by the assembly. The first statement in each group represents the highest priority for future action.

The Catholic Identity of Catholic Schools

- We will guarantee opportunities for ongoing spiritual formation for Catholic school faculties, staff and leadership.
- We will challenge our faculty, staff, students, and families to witness to their belief in Jesus Christ.
- We will champion superior standards of academic excellence.
- We commit ourselves to teach an integrated curriculum rooted in gospel values and Catholic teachings.
- We will welcome and support a diverse cultural and economic population as a hallmark of our Catholic identity.

Leadership of and on Behalf of Catholic Schools

- We will challenge the U.S. bishops to implement their November, 1990 statement on Catholic schools, since their leadership is critical to the future of Catholic schools.
- We will actively identify, select and develop Catholic school leaders who espouse Gospel values and demonstrate professional competencies.
- We will demand that innovation, experimentation, risk-taking, collaboration and collegiality be the hallmarks of Catholic school leadership.
- We will challenge Catholic colleges and universities to hold as a priority the development of Catholic educational administrators and teachers.
- We will aggressively recruit and prepare leaders who reflect the Church's multi-cultural, multi-racial, and multi-ethnic populations.

Catholic Schools and Society

- We will educate students to meet the intellectual, social and ethical challenges of living in a technological and global society.
- We will open new schools and design alternative school models to reflect the changing needs of family, church, and society.
- We will educate and challenge our staffs, students, and parents to reject racism, sexism, and discrimination.
- We will aggressively recruit, retain and develop staff to reflect the needs of an increasingly multi-ethnic, multi-racial, and multi-cultural society.
- We will establish curriculum that acknowledges and incorporates the contributions of men and women of diverse cultures and races.

Catholic School Governance and Finance

- We will challenge the entire Catholic community and others to make a radical commitment to Catholic schools and generous investment in them.
- We will establish governance structures which give all those committed to the Catholic school's mission the power and responsibility to achieve it.
- We will immediately initiate long-range strategic planning processes for Catholic schools at local, diocesan, and national levels.
- We will implement in every school just compensation plans for all Catholic school personnel.
- We will implement and evaluate comprehensive development programs at the local, diocesan, and national levels.

Political Action, Public Policy and Catholic Schools

- We will organize broad-based coalitions to lobby on every level in order to achieve equal educational opportunities for all children, parents and educators.
- We will aggressively pursue legislation enabling all parents to choose the education appropriate for their children with their share of the education tax dollar.
- We will promote tax-supported school choice options for all that enable the poor to choose as effectively as all others.
- We will create structures to direct and coordinate the political agenda of tax-supported choice in education for all parents.
- We will persuade the American public that full parental choice in education is a necessity in a free society.

EPILOGUE

The *National Congress on Catholic Schools for the Twenty-first Century* is not simply a Washington event, but a movement that began over a year ago, and continues in the years ahead. Our proposed agenda of beliefs and directions, and our examples of possible strategies, provide a challenging and ambitious platform for future action. But they do not exhaust our hopes and dreams for the future.

We dream of a future in which many new Catholic schools are built, a future in which there are places in Catholic schools for the children of all Catholic families, wherever they live, whatever their income, and whatever special needs and gifts their children may have. We dream of a future in which the 800,000 students from low-income families who attend our schools today will be joined by many more, whose parents' choice is supported by a society that recognizes that poor children are our children, and their future is our future.

We offer a challenge and an invitation to all who share our convictions about the importance of our Catholic schools. Now is the time to use the wisdom and talent we have to build a stronger and larger network of Catholic schools; now is the time to invite others to share today's tasks and tomorrow's dreams.

November 1991
Washington, DC

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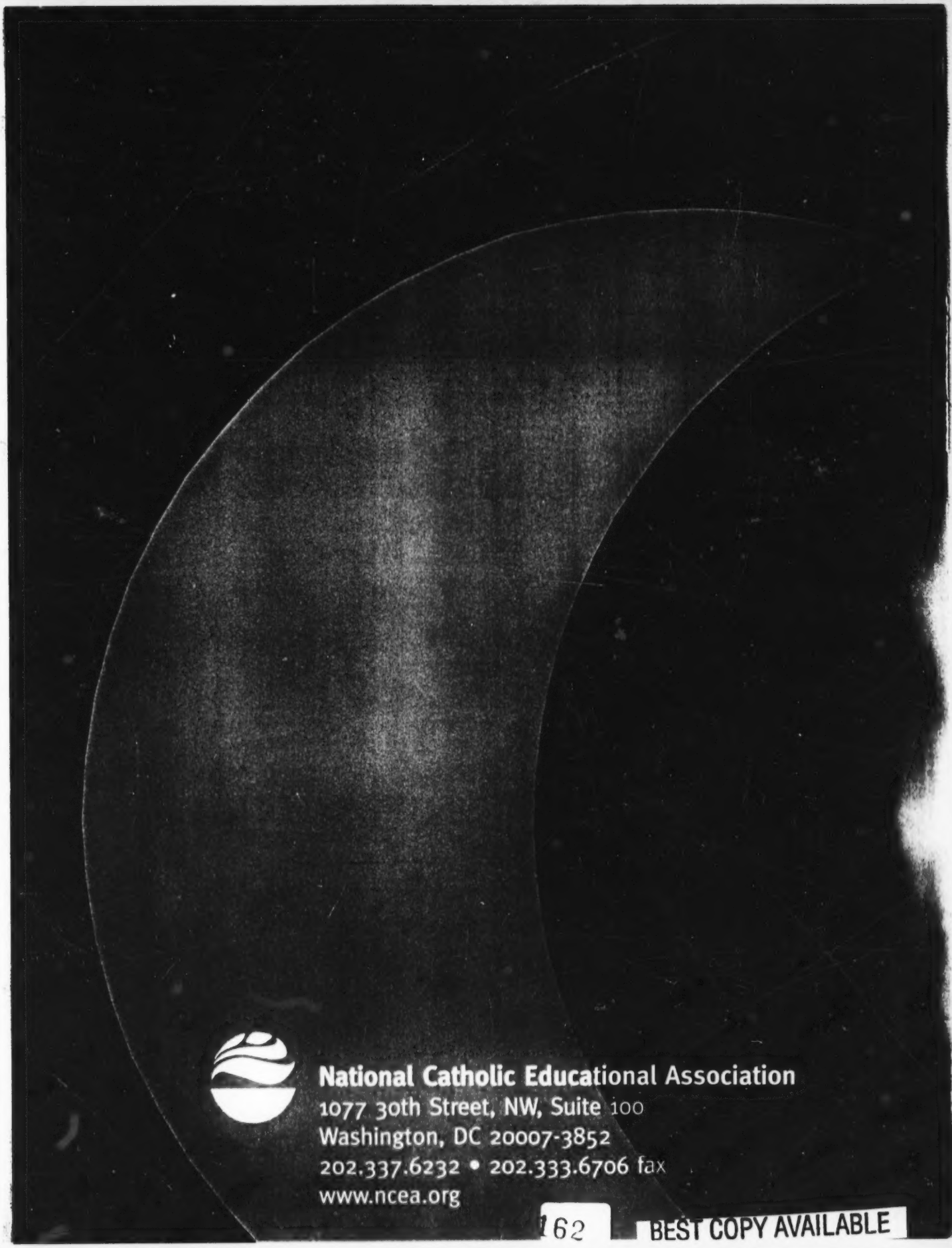

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